



Spectrum™ Technology Platform

Version 10.0 SP1

Enterprise Tax Guide

Table of Contents

1 - Introduction

| | |
|-----------------------|---|
| Enterprise Tax Module | 4 |
|-----------------------|---|

2 - Assign GeoTAX Info

| | |
|---|----|
| Assign GeoTAX Info | 11 |
| Determining Tax Rates with Assign GeoTAX Info | |
| Address Matching | 13 |
| Buffering | 14 |
| Input | 15 |
| Matching Options | 16 |
| Geocoding Options | 20 |
| Output Data Options | 23 |
| Output | 26 |

3 - Calculate Distance

| | |
|--------------------|----|
| Calculate Distance | 62 |
| Input | 62 |
| Options | 63 |
| Output | 64 |

4 - Reverse GeoTAX Info Lookup

| | |
|----------------------------|----|
| Reverse GeoTAX Info Lookup | 67 |
| Geocoding Options | 69 |
| Output Data Options | 70 |
| Output | 72 |

5 - Reports

| | |
|-----------------|----|
| Summary Reports | 96 |
|-----------------|----|

Appendix

| | |
|---------------------------------|-----|
| Appendix A: | |
| Match and Location Codes | 104 |
| Appendix B: | |
| Payroll Tax Correspondence File | 119 |
| Appendix C: | |
| User-Defined Data Files | 125 |
| Appendix D: | |
| Type Codes | 136 |
| Appendix E: | |
| Class Codes | 142 |

1 - Introduction

In this section

Enterprise Tax Module

4

Enterprise Tax Module

The Enterprise Tax Module (ETM) determines the tax jurisdiction for an address. The Enterprise Tax Module takes an address, standardizes it, and then matches the address to an exact physical location, returning latitude/longitude coordinates with the correct place code for the address. This solution greatly reduces the inaccuracies associated with 9-digit and 5-digit ZIP Code-based matching. The Enterprise Tax Module can also calculate latitude/longitude coordinates for individual address locations, including the use of interpolation and offset.

For companies that deliver goods or services to locations that don't have a recognizable address, the Enterprise Tax Module can accept latitude/longitude coordinates as input to return the tax jurisdictions and corresponding GeoTAX Key values. Examples of this type of location include bill boards, street lights, communications towers or new housing developments.

The Enterprise Tax Module uses a database of tax jurisdictions provided by TomTom. This data, which is collected through an ongoing research program and updated regularly, provides current jurisdictional boundary information down to the municipal and special tax district levels.

In addition to determining the tax jurisdiction for an address or location, with the optional Pitney Bowes Software Sales and Use Tax Rate file, the Enterprise Tax Module can return sales and use tax rates for each of the assigned tax jurisdictions as well as the total tax rate for the assigned locations. There is also the option to use other software, such as Vertex or Taxware, to cross-reference and supply tax rate data.

Note: The Enterprise Tax Module processes only U.S. addresses.

Enterprise Tax Components

The Enterprise Tax Module consists of the following components.

- **Assign GeoTAX Info** - Takes an input address and returns census, latitude/longitude, and tax information about the address. Assign GeoTAX Info utilizes Pitney Bowes's GeoTAX technology.
- **Calculate Distance** - Takes two latitude/longitude coordinates as input and computes and returns the distance between the coordinates.
- **Reverse GeoTAX Info Lookup** - Takes an input latitude/longitude coordinate and returns census and tax information about the location. This service will not return an address for the location.

Enterprise Tax Databases

The Enterprise Tax Module provides you with several different databases, along with the ability to include additional databases to match against your input addresses or geographic coordinates.

Table 1: Enterprise Tax Module Databases

| Database Name & Description | Required or Optional | Supplier |
|--|----------------------|---|
| GeoTAX/Enterprise Tax Premium Master Files The master files are the main data files used by the Enterprise Tax module. They identify all geographic components associated with a street address, such as the tax jurisdictions, latitude/longitude, census tract, and block group. These files, at over two gigabytes of data, are significantly larger than the postal file, but provides the greatest coding accuracy. Note: The GeoTAX/Enterprise Tax Premium Database is a required data set and is the master file for the Enterprise Tax Premium Module software. This data is not compatible with any previously released version of the Enterprise Tax Module. The master files are available for download from the technical support web site, www.g1.com/support . | Required | Pitney Bowes monthly/quarterly subscription |
| Point Data Files Point Data products include Master Location Data (MLD), Centrus Points, Centrus NAVTEQ Points, and Centrus TomTom Points. The point data provides point-level geocoding for the most accurate placement of addresses throughout the U.S. The Master Location Data database provides the best available address point location for every mailable and deliverable address in the United States. | Optional | Pitney Bowes monthly subscription |
| State-Supplied Files State-supplied files are provided by individual state governments that the Enterprise Tax Module uses to override results from the master files. The Enterprise Tax Module provides you with the ability to override, at the state level, match results based upon information supplied by the states. By matching to the state-supplied files, you can remain compliant with tax jurisdiction assignment requirements mandated by new federal and state laws, such as the Mobile Telecommunications Sourcing Act and the Florida state Communications Services Tax Simplification Law. Currently, there are two file formats supported in the Enterprise Tax Module: the Florida-native format, and the national TS-158 format (ANSI Transaction | Optional | State Governments |

| Database Name & Description | Required or Optional | Supplier |
|-----------------------------|----------------------|----------|
|-----------------------------|----------------------|----------|

Set No. 158). The state of Florida provides address files in both the TS-158 and its own native format.

Note: This database option may not be available to all Enterprise Tax users. Individual states may restrict the use of state-supplied address files to licensed communications carriers or other business entities registered with the individual state.

The Enterprise Tax Module first attempts to match to the state database. If the Enterprise Tax Module cannot find a state match, it attempts a match to the GeoTAX Auxiliary file, if loaded, then to the master files.

| | | |
|--|----------|-----------------------------------|
| GeoTAX Auxiliary File | Optional | Pitney Bowes monthly subscription |
| The GeoTAX Auxiliary file contains new addresses that have not yet been added to the Master File. It provides the most up-to-date address data possible. | | |

| | | |
|--|----------|--------------|
| Landmark Auxiliary File | Optional | User-defined |
| The Landmark Auxiliary File is a user-defined file that allows you to specify customized address information in your input records. The recommended primary use of this file to match to your company's non-address locations such as well heads, transmission towers or any other descriptive location. The latitude/longitude that is part of the input needed to build this file allows companies to automatically keep track of any jurisdictional changes that affect these unique locations. Matching to this file requires that the input record information match exactly to the Landmark file contents. This also applies to street records if you choose to enter them in the Landmark file. | | |

Note: For more information, see [Creating a Landmark Auxiliary File](#) on page 126 .

| | | |
|--|----------|--------------|
| User Auxiliary File | Optional | User-defined |
| User Auxiliary files are user-defined files that the Enterprise Tax Module uses to override results from the master files in street-level matching. If you have data that is more current than that in the master files, you can enter the new data into the auxiliary file and use it for your address matching. The Enterprise Tax Module returns matches made with a code that signifies the answer came from the auxiliary file. You can also return user-defined data from the auxiliary file with the match. | | |

Note: For more information, see [Creating a User-Defined Auxiliary File](#).

| | | |
|-----------------------|----------|--------------|
| Boundary Files | Optional | Pitney Bowes |
| | | |

| Database Name & Description | Required or Optional | Supplier |
|-----------------------------|----------------------|----------|
|-----------------------------|----------------------|----------|

Boundary files provide additional data about locations of special tax districts: Special Purpose Tax Districts (SPD), Insurance Premium Tax Districts (IPDs), Payroll Tax Districts (PAYs), Personal Property Tax Districts (PTDs) and User-Defined Boundary (USR) .

- The **Special Purpose District file** (SPD.txb) provides you with return data on special purpose tax districts. Special purpose tax districts include such districts as Regional Transit Areas and Metropolitan Football districts.
- The **Insurance Premium District file** (IPD.txb) is used by the insurance industry to determine sales tax on insurance premiums written in some states. This file allows insurers to correctly determine the rate due on each insurance policy. Boundaries vary by state and are based on fire and police district and municipal boundaries.
- The **Payroll Tax District (PAY) file** (PAY.txb) can help your company comply with state legislation that requires employers to deduct taxes from employee paychecks for special districts, such as taxes for emergency municipal services districts.
- The **Personal Property Tax District** file (PTD.txb) provides your company with a complete solution for accurate, automated asset collection and jurisdiction assignment.

Pitney Bowes provides you with the appropriate boundary file on separate media if you license any of the optional files.

Note: The Enterprise Tax Module only uses one boundary file at a time. For more information, see the configuration options in [Assign GeoTAX Info](#) on page 11.

| | | |
|-----------------------------------|----------|--------------|
| User-Defined Boundary File | Optional | User-created |
|-----------------------------------|----------|--------------|

A user-defined boundary file (usr.txb) is a file that you create to represent polygons that you want to match against, such as sales territories, insurance rating territories, or any geographic areas that are of interest to you.

Note: For more information, see [Creating a User-Defined Boundary File](#) on page 135.

| | | |
|---|----------|--------------|
| Pitney Bowes Sales and Use Tax Rate File | Optional | Pitney Bowes |
|---|----------|--------------|

You can optionally license the Pitney Bowes Sales and Use Tax Rate file to supply sales and/or use tax rate data for the general, automotive, construction or medical industries. Sales and use tax rates can be returned for each of the assigned tax jurisdictions as well as the total tax rate for the assigned locations.

| | | |
|--|----------|--------------|
| Sales Tax Cross-Reference Files | Optional | Pitney Bowes |
|--|----------|--------------|

| Database Name & Description | Required or Optional | Supplier |
|-----------------------------|----------------------|----------|
|-----------------------------|----------------------|----------|

Sales tax cross-reference files allow you to use the Enterprise Tax Module to determine tax jurisdictions for a given address, then use third-party software to determine the sales tax rates for those jurisdictions. The cross-reference files combine the U.S. Government Federal Information Processing Standards (FIPS) codes with the proprietary geocodes used by tax software from third parties.

Note: When using a cross-reference file, the SPD file must also be loaded.

- **Vertex Files**—The Vertex files enable you to integrate the Enterprise Tax Module with tax compliance software from Vertex, Inc. With this file, the Enterprise Tax Module component AssignGeoTAXInfo can return the nine-digit Vertex jurisdiction code for an address. You can then match these codes to the Vertex tax tables, which tell you the tax rate for each jurisdiction. To use the Vertex file you must have either the MatchMaster file from Vertex or the PBS Vertex file from Pitney Bowes to build the cross reference.
- **Taxware Files**—The Taxware files enable you to integrate the Enterprise Tax Module with tax compliance software from Taxware. With this file, the Enterprise Tax Module component AssignGeoTAXInfo can return the Taxware jurisdiction code for an address. You can then match these codes to the Taxware tax tables, which tell you the tax rate for each jurisdiction. The Taxware files are supplied by Pitney Bowes and support both the SUT and TWE Taxware versions.

| | | |
|--|----------|--------------|
| Payroll Tax Cross-Reference Files | Optional | Pitney Bowes |
|--|----------|--------------|

Payroll tax cross-reference files allow you to use third-party software to determine the payroll tax rates. The cross-reference files combine the U.S. Government Federal Information Processing Standards (FIPS) codes with the proprietary geocodes used by tax software from third parties. The Payroll System Tax Code file is a customized file that you build to return the payroll tax codes used by your payroll system.

Note: For more information, see [Using a Payroll Tax Correspondence File](#) on page 120.

Adding a Database Resource

Note: All ETM databases and cross-reference files must be downloaded to the same directory.

To add a database:

1. Under Tools, click the **Database Resources** icon.
2. Click the **Add...** button.

The **Add Database Resource** window displays. Using this window, you have the option of adding one or more databases at a time.

3. Enter a name in the **Name** textfield to reference the database(s) selected.
4. If you are adding a State supplied file or a Sales tax cross-reference file, select a radio button option, then enter the path and filename of your database in the textfield or use the ... button to navigate to your database.
5. For the required GeoTAX Master files and all other databases, enter the path and filename of your database in the textfield or use the ... button to navigate to your database.
6. Click **OK** to complete the database load process.

Database Search Order

Enterprise Tax Module is able to process addresses using multiple databases at the same time. This allows you to find the best possible match from a variety of data sources and types of data (point as well as street segment data).

Enterprise Tax Module processes these multiple data sources using a default search order. When Enterprise Tax Module matches an address exactly, it stops searching rather than continuing the search in additional databases. This saves on processing time. When an exact match is not found, Enterprise Tax Module continues searching all of the available data sources for candidate address matches. The candidates are then scored and the highest scoring match from all of the data sources is returned as the match. If multiple candidates receive an identical score when matched to either the Points or Streets files, you have the option to set what results should be returned.

The default search order for Enterprise Tax Module is:

- Landmark Auxiliary file
- User Auxiliary file
- State-supplied file
- GeoTAX Auxiliary file
- Points file, if licensed
- Streets file

2 - Assign GeoTAX Info

In this section

| | |
|---|----|
| Assign GeoTAX Info | 11 |
| Determining Tax Rates with Assign GeoTAX Info | 12 |
| Address Matching | 13 |
| Buffering | 14 |
| Input | 15 |
| Matching Options | 16 |
| Geocoding Options | 20 |
| Output Data Options | 23 |
| Output | 26 |

Assign GeoTAX Info

Assign GeoTAX Info identifies the tax districts that apply to a given address. Specifically, Assign GeoTAX Info returns this information about an address:

- Latitude/longitude coordinates
- FIPS state codes and county codes
- County names
- MCD/CCD codes and names
- CBSA/CSA codes and names
- Place codes and names
- Incorporated or unincorporated status codes
- Cross-reference tax keys
- Result indicators
- Optionally, the relationship of an address to user-defined polygons

Assign GeoTAX Info optionally includes enhanced tax jurisdiction information for an address, including:

- **Insurance premium districts**—Areas designated for the collection of taxes imposed on insurance policy premiums, based on the policy holder's address. Insurance premium districts are created by state governments.
- **Payroll tax districts**—Areas designated for the collection of taxes imposed on employers to support state or local government facilities and services, based on the employee's and/or employer's address. Examples include taxes collected for districts to pay for schools, police, or other services. Payroll tax districts are created by state or local governments.
- **Payroll system tax codes**—Codes that represent specific jurisdictions that collect payroll tax. Using payroll system tax codes has advantages over using the payroll tax district information returned by Assign GeoTAX Info:
 - Assign GeoTAX Info uses an additional database to determine payroll tax codes, resulting in more accurate payroll tax determination.
 - Many payroll systems use specific codes to determine withholding amounts. Since you can customize the payroll tax codes returned by Assign GeoTAX Info, you can set up a process where Assign GeoTAX Info returns the exact payroll tax codes required by your payroll system, instead of returning jurisdictional IDs that must then be translated into the codes used by your system.
- **Property tax districts**—Areas designated for the collection of taxes imposed on property owners to support local government facilities and services, based on the property's location. Examples include taxes collected for districts to pay for schools, police, or other services. Property tax districts are created by local governments.

- **Special purpose tax districts**—Areas designated for the collection of taxes imposed on residents to support specialized services for residents of the district, based on the resident's address. Examples include services such as sewer service, transit service, or water resources. Special purpose tax districts are created by legislative action, court action, or public referendums. This optional information requires the use of boundary files which require an additional license. Contact your Pitney Bowes sales representative for more information.
- **Sales and Use Tax Rates**—Using the optional Pitney Bowes Sales and Use Tax Rate file, Assign GeoTAX Info can return sales and use tax rates for each of the assigned tax jurisdictions as well as the total tax rate for the assigned locations.

Assign GeoTAX Info is part of the Enterprise Tax Module.

Determining Tax Rates with Assign GeoTAX Info

Assign GeoTAX Info determines tax jurisdictions that apply to a given location. There are several options for determining tax rates for a location: use the optional Pitney Bowes Sales and Use Tax Rate file, use other software, such as Vertex or Taxware, or develop a custom process.

- Using Pitney Bowes Sales and Use Tax Rate file
 - a) On the Options panel, click the **Output** icon.
 - b) In the **Sales tax rate type** field, select either: General, Automotive, Construction or Medical. This option returns tax rates for the selected industry. For more information, see [Sales and Use Tax Rates](#) on page 55.
- Using Vertex or Taxware Software
 - a) On the Options panel, click the **Output** icon.
 - b) Under **Include data**, select the **Tax Jurisdiction** check box. This option returns several tax jurisdiction fields. The GeoTAXKey field contains the Vertex or Taxware code. For more information on these fields, see [Tax Jurisdiction](#) on page 39.
 - c) In the **Sales tax cross-reference key** field, select Vertex MatchMaster or PBS Vertex to have Assign GeoTAX Info return a Vertex key, or select Taxware to have Assign GeoTAX Info return a Taxware key.
- Using a Custom Process

If your organization has defined custom tax codes, you can use the jurisdiction information returned by Assign GeoTAX Info to look up the tax jurisdictions in your custom tables. To do this, you need to configure Assign GeoTAX Info to return the following fields:

- StateCode
- County.Code
- GNISCode or Place.Code
- SPDn.DistrictCode

To include these fields in the output,

- On the Options panel, click the **Output** icon.
- In the Tax district field, select **Special Purpose Districts**. This option returns the SPDnDistrictCode field that you will need to look up tax rates, as well as the fields noted above. For more information, see [Special Purpose Tax District](#) on page 53.

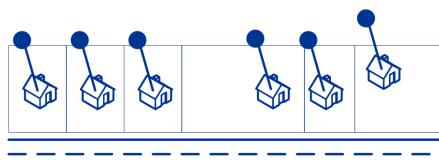
Address Matching

Assign GeoTAX Info takes a house address and matches it to the correct street segment. Using the house number, it determines the side of the street on which the house resides (usually based on an odd-even division). Knowing the correct side of the street is important because streets are often the boundaries between municipalities or other adjoining jurisdictions that may have different tax rates. Thus, two addresses on the same street, in the same city, within the same ZIP Code could exist in different jurisdictions and have different tax rates.

After Assign GeoTAX Info knows the correct street segment, it determines the actual physical location of the house based on known latitudes/longitudes and other geographic data in the street segment database. Assign GeoTAX Info returns the coordinates of the house, along with other data.

Point-level matching

Point-level matching locates the center of the actual building footprint or parcel. This is the most accurate type of geocode.



If you are licensed for the point-level data option, you do not need to execute any additional initialization or setup for your system to begin using the point-level data. The Enterprise Tax Module automatically processes your address lists through the point-level data.

When processing address lists, the Enterprise Tax Module first searches for a match in the point-level data. If it cannot find an exact match in the point-level data, the Enterprise Tax Module continues searching for a better match in the street network data. The Enterprise Tax Module returns the best match found, with preference given to matches from the point-level dataset.

Note: Point data must be used in conjunction with a standard street data set.

Buffering

Use buffering to define areas that are close to the edges of a polygon, line, or point.



Buffered Polygon (zone)

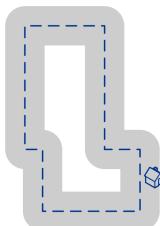


Buffered Line (corridor)

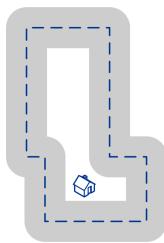


Buffered Point (circle)

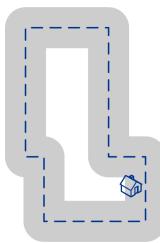
For example, if you work for an insurance company you may want to know if a potential customer's house is within 500 feet of a flood plain so that you can suggest that they buy flood insurance even though they are not actually within the flood plain. The following illustration shows this scenario using a buffered polygon. The dotted line indicates the boundary of the flood plain and the shaded area shows a 500-foot buffer zone around the boundary.



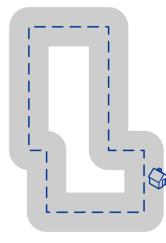
The buffer area extends on both sides of the boundary (inside and outside). When you use buffering, the output field BufferRelation indicates whether or not the point is in the buffered zone, and whether the point is inside or outside of the polygon, as shown in the following illustrations.



The point is inside the polygon and not in the buffer area.



The point is inside the polygon and in the buffer area.



The point is outside the polygon but in the buffer area.

| | | |
|---|---|---|
| The output field BufferRelation will contain "P". | The output field BufferRelation will contain "I". | The output field BufferRelation will contain "B". |
|---|---|---|

Specify the size of polygon buffers using the BufferWidth input field to set it on a record-by-record basis and the Default Buffer Width option to set a default polygon buffer width for the job.

Input

The following table provides information on the format of Assign GeoTAX Info input.

Table 2: Assign GeoTAX Info Input Data

| Field Name | Format | Description |
|--------------|--------------|---|
| AddressLine1 | String [100] | First address line |
| AddressLine2 | String [100] | Second address line |
| AddressLine3 | String [100] | Third address line |
| AddressLine4 | String [100] | Fourth address line |
| BufferWidth | String [10] | <p>Specifies the width of the polygon buffers to use for Boundary File processing. The buffer width is used to determine if a point is close to the edge of a polygon. The output field BufferRelation indicates whether or not the point is within the polygon's buffer area. For more information, see Buffering on page 14.</p> <p>This field overrides the value specified in the Default buffer width option.</p> <p>If you do not specify a buffer width in this input field, the default is used.</p> |

| Field Name | Format | Description |
|-----------------|--------------|--|
| CandidateID | String [1] | For a multi-match outcome, indicates which match result should be returned; valid values are 1-9. |
| City | String [50] | City name |
| Country | String [var] | The country where the address resides. The data you enter in this field has no impact on processing. It is simply passed through to output. Note: Assign GeoTAX Info only supports US addresses. |
| FirmName | String [var] | Company or firm name |
| PostalCode | String [9] | Nine-digit ZIP Code |
| StateProvince | String [50] | The state where the address resides. The data you enter in this field has no impact on processing. It is simply passed through to output. |
| UserBufferWidth | Long [10] | <p>Specifies the width of the polygon buffers to use for User-Defined Boundary File processing. The buffer width is used to determine if a point is close to the edge of a polygon. The output field BufferRelation indicates whether or not the point is within the polygon's buffer area. For more information, see Buffering on page 14.</p> <p>This field overrides the value specified in the Default buffer width option.</p> <p>If you do not specify a buffer width in this input field, the default is used.</p> |

Matching Options

Matching options control the address search methodology and match results handling returned by Assign GeoTAX Info. [Table 3: Assign GeoTAX Info Matching Options](#) on page 17 lists the address search and matching options.

Table 3: Assign GeoTAX Info Matching Options

| Option Name | Description | | | | | | | | |
|--|---|-------------|-----------------------------------|-----------------------|---|---------------|-------------------------------------|---|---|
| Optional files: The following options enable the database resource(s) to use in the search process. | | | | | | | | | |
| Use GeoTAX Auxiliary file | Specifies whether or not Assign GeoTAX Info should attempt a match to the GeoTAX Auxiliary file. The GeoTAX Auxiliary file contains new addresses that have not yet been added to the Master File. | | | | | | | | |
| Use user auxiliary file | Specifies whether or not Assign GeoTAX Info should attempt a match to a User Auxiliary file. User Auxiliary files are user-defined files that the Enterprise Tax Module uses to override results from the master files in street-level matching. | | | | | | | | |
| State supplied file | <p>Specifies a state-supplied file to use for address matching. State-supplied files are provided by individual state governments. By matching to the state-supplied files, you can remain compliant with tax jurisdiction assignment requirements mandated by new federal and state laws, such as the Mobile Telecommunications Sourcing Act and the Florida state Communications Services Tax Simplification Law.</p> <p>There are two supported file formats: the Florida-native format and the national TS-158 format (ANSI Transaction Set No. 158). The state of Florida provides address files in both the TS-158 and its own native format. The state of Washington provides address data in the TS-158 format.</p> <p>Assign GeoTAX Info attempts to match to the state supplied file first. If a state match cannot be found, it attempts a match to the master files.</p> <p>You must install the appropriate state-supplied file to use these options. For instructions, see the <i>Spectrum™ Technology Platform Installation Guide</i>.</p> <table> <tr> <td>None</td><td>Do not use a state-supplied file.</td></tr> <tr> <td>Florida-native</td><td>Use the Florida-native state-supplied file.</td></tr> <tr> <td>TS-158</td><td>Use the TS-158 state-supplied file.</td></tr> <tr> <td>Florida-native with relaxed secondary matching</td><td>Use the Florida-native state-supplied file and allow the system to match input addresses with secondary information to records without secondary information.</td></tr> </table> <p>Note: If you use the Spectrum™ Technology Platform API, see Specifying Default State-Supplied File Options on page 19 for information on how these values affect the default values for related API options.</p> | None | Do not use a state-supplied file. | Florida-native | Use the Florida-native state-supplied file. | TS-158 | Use the TS-158 state-supplied file. | Florida-native with relaxed secondary matching | Use the Florida-native state-supplied file and allow the system to match input addresses with secondary information to records without secondary information. |
| None | Do not use a state-supplied file. | | | | | | | | |
| Florida-native | Use the Florida-native state-supplied file. | | | | | | | | |
| TS-158 | Use the TS-158 state-supplied file. | | | | | | | | |
| Florida-native with relaxed secondary matching | Use the Florida-native state-supplied file and allow the system to match input addresses with secondary information to records without secondary information. | | | | | | | | |

Address Searching and Matching Options: The following options can be enabled for use in the address search and match processes.

| Option Name | Description |
|--------------------------------------|---|
| Match Modes | <p>Match modes determine the leniency used to make a match between your input and the reference database. Select a match mode based on the quality of your input and your desired output. For example, if you have an input database that is prone to errors, you may want to select the relaxed match mode.</p> |
| | <p>Exact Requires a very tight match. This restrictive mode generates the fewest match candidates, which decreases the processing time. When using this mode, ensure that your input is very clean; free of misspellings and incomplete addresses.</p> <p>Close Requires a close match and generates a moderate number of match candidates. (default)</p> <p>Relaxed Allows a loose match and generates the most match candidates, which increases the processing time and results in more multiple matches. Use this mode if you are not confident that your input is clean; free of misspellings and incomplete addresses. This is the only mode that does not respect the street parity when making an address match.</p> |
| Search area preference | <p>The search area options allow for searching the address' finance area or an expanded area specified by distance.</p> <p>Finance area Searches the entire finance area for a match. A finance area is a region defined by the U.S. Postal Service and typically consists of a set of contiguous ZIP Codes.(default)</p> <p>Search within radius Searches the area specified by the radius in miles. The search area can be extended up to a 99-mile radius from the centroid of the input ZIP Code to assist in finding a match when the input address contains limited or inaccurate city or ZIP Code information. The expanded area is confined to within the state's borders.</p> |
| Check for First Letter Missing/Wrong | <p>Looks for the correct first letter of a street address if the first letter is missing or incorrect. The Enterprise Tax Module searches through the alphabet looking for possible correct first letters to complete the street address.</p> |
| | <p>Note: This feature is disabled by default and cannot be enabled in Exact mode.</p> |
| Allow Ranged Address Numbers | <p>Matches to a house range input. Some business locations are identified by address ranges. For example, a shopping plaza could be addressed as 10-12 Front St. - this is how business mail is typically addressed to such a business location. When this feature is enabled, the address range is geocoded to the interpolated mid-point of the range.</p> |

| Option Name | Description | | | | | | | |
|---------------------------------|--|--|-----------------------------|---|------------------------------|---|---------------------------------|---|
| Firm name search | <p>This option allows specifying the preferred way to match when both an address and firm name are provided. The matching method can be set to match to the address rather than the firm name or vice versa. If neither are specified, the default matching method is to match to the address line only.</p> <table> <tr> <td>Street Lookup Only</td><td>Searches only street records. (default)</td></tr> <tr> <td>Prefer Street Name</td><td>Searches for street name, but if there isn't a match, will use the firm name.</td></tr> <tr> <td>Prefer Firm Name</td><td>Looks up the firm name, but if there isn't a match, will use the street name.</td></tr> </table> | | Street Lookup Only | Searches only street records. (default) | Prefer Street Name | Searches for street name, but if there isn't a match, will use the firm name. | Prefer Firm Name | Looks up the firm name, but if there isn't a match, will use the street name. |
| Street Lookup Only | Searches only street records. (default) | | | | | | | |
| Prefer Street Name | Searches for street name, but if there isn't a match, will use the firm name. | | | | | | | |
| Prefer Firm Name | Looks up the firm name, but if there isn't a match, will use the street name. | | | | | | | |
| Multi-match | <p>A multi-match occurs when multiple equally-scored matches are found in either the Points or Streets files and cannot be resolved to a single best candidate. There are several choices for handling a multi-match outcome:</p> <table> <tr> <td>Reject multi-matches</td><td>No matches are returned. (default)</td></tr> <tr> <td>Resolve multi-matches</td><td>Return the first match candidate in the list.</td></tr> <tr> <td>Return all multi-matches</td><td>The information for all the match candidates is returned.</td></tr> </table> | | Reject multi-matches | No matches are returned. (default) | Resolve multi-matches | Return the first match candidate in the list. | Return all multi-matches | The information for all the match candidates is returned. |
| Reject multi-matches | No matches are returned. (default) | | | | | | | |
| Resolve multi-matches | Return the first match candidate in the list. | | | | | | | |
| Return all multi-matches | The information for all the match candidates is returned. | | | | | | | |

Specifying Default State-Supplied File Options

If you use the Spectrum™ Technology Platform API, note that the value you specify in the Management Console for the **State supplied file** field controls the default settings for three AssignGeoTAXInfo API options: UseStateProvidedFile, UseRelaxedSecondary, and FileSearchOrder. The following table show how each value in the **State supplied file** field affects these three options.

| "State supplied file" value | UseStateProvidedFile | FileSearchOrder | UseRelaxedSecondary |
|--|----------------------|-----------------|---------------------|
| None | N | N/A | N |
| Florida-native | Y | FSOnly | N |
| Florida-native with relaxed secondary matching | Y | FSOnly | Y |

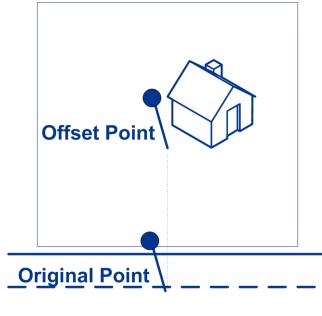
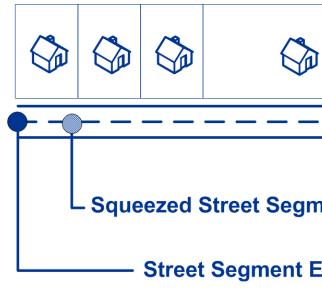
| "State supplied file" value | UseStateProvidedFile | FileSearchOrder | UseRelaxedSecondary |
|-----------------------------|----------------------|-----------------|---------------------|
| TS-158 | Y | TSOnly | N |

Geocoding Options

Geocoding is the process of determining the latitude/longitude coordinates of a given address. Address coordinates are used as the basis for determining the tax jurisdictions for an address. Geocoding options control how Assign GeoTAX Info determines address latitude/longitude coordinates.

Table 4: Assign GeoTAX Info Geocoding Options

| Option Name | Description |
|---|---|
| Database | Select the database resource to use in the geocoding process. |
| Latitude/Longitude placement: The following options can be set for the geocode result. | |
| Offset | <p>Indicates the offset distance in feet from the street center line.</p> <p>The offset distance is used in street-level geocoding to prevent the geocode from being in the middle of a street. It compensates for the fact that street-level geocoding returns a latitude and longitude point in the center of the street where the address is located. Since the building represented by an address is not on the street itself, you do not want the geocode for an address to be a point on the street. Instead, you want the geocode to represent the location of the building which sits next to the street. For example, an offset of 50 feet means that the geocode will represent a point 50 feet back from the center of the street. The distance is calculated perpendicular to the portion of the street segment for the address. Offset is also used to prevent addresses across the street from each other from being given the same point. The following diagram shows an offset point in relation to the original point.</p> |

| Option Name | Description | | | | | | | | | | |
|--|---|----------------------------------|----------------------------------|------------------------|--|------------------------------|---|--|--|--------------------------------------|---|
| |  <p>The diagram illustrates an 'Offset Point' and an 'Original Point'. An 'Offset Point' is shown above a house icon, connected by a dashed line to a 'Original Point' located below the house. A vertical dashed line connects the two points.</p> | | | | | | | | | | |
| Squeeze geocode | <p>Specifies if Assign GeoTAX Info should squeeze the street end points when determining the geocode of an address in street-level matching. The squeeze value is 5% (2.5% from each endpoint). The following diagram compares the end points of a street segment to the squeezed end points of a street segment.</p> | | | | | | | | | | |
| |  <p>The diagram shows a horizontal row of house icons representing a street segment. Below it, a 'Street Segment End' is shown as a rectangle with two black circular endpoints. The text 'Squeezed Street Segment End' indicates a shorter segment where the endpoints have been moved inward toward the center of the street segment, compared to the original segment ends.</p> | | | | | | | | | | |
| Latitude/Longitude format | <p>Indicates the desired format for returned latitude/longitude. Options include:</p> <table> <tbody> <tr> <td data-bbox="626 1290 850 1353">Degrees, minutes, seconds</td><td data-bbox="915 1290 1318 1324">For example 90 00 00N180 00 00W.</td></tr> <tr> <td data-bbox="626 1374 833 1408">Decimal degrees</td><td data-bbox="915 1374 1334 1408">Latitude/longitude in decimal degrees.</td></tr> <tr> <td data-bbox="626 1429 882 1579">Include decimal point</td><td data-bbox="915 1429 1428 1579">If not selected, the return value is similar to 90000000-180000000 or 090000000N180000000W. If selected, the return value is similar to 90.000000-180.000000 or 090.000000N180.000000W)</td></tr> <tr> <td data-bbox="626 1600 899 1695">Use directional indicator (N,S,E,W)</td><td data-bbox="915 1600 1351 1695">If selected, the return value is similar to 090000000N180000000W or 090.000000N180.000000.</td></tr> <tr> <td data-bbox="626 1717 833 1797">Use signed latitude/longitude</td><td data-bbox="915 1717 1351 1797">If selected, the return value is similar to 90000000-180000000 or 90.000000-180.000000)</td></tr> </tbody> </table> | Degrees, minutes, seconds | For example 90 00 00N180 00 00W. | Decimal degrees | Latitude/longitude in decimal degrees. | Include decimal point | If not selected, the return value is similar to 90000000-180000000 or 090000000N180000000W. If selected, the return value is similar to 90.000000-180.000000 or 090.000000N180.000000W) | Use directional indicator (N,S,E,W) | If selected, the return value is similar to 090000000N180000000W or 090.000000N180.000000. | Use signed latitude/longitude | If selected, the return value is similar to 90000000-180000000 or 90.000000-180.000000) |
| Degrees, minutes, seconds | For example 90 00 00N180 00 00W. | | | | | | | | | | |
| Decimal degrees | Latitude/longitude in decimal degrees. | | | | | | | | | | |
| Include decimal point | If not selected, the return value is similar to 90000000-180000000 or 090000000N180000000W. If selected, the return value is similar to 90.000000-180.000000 or 090.000000N180.000000W) | | | | | | | | | | |
| Use directional indicator (N,S,E,W) | If selected, the return value is similar to 090000000N180000000W or 090.000000N180.000000. | | | | | | | | | | |
| Use signed latitude/longitude | If selected, the return value is similar to 90000000-180000000 or 90.000000-180.000000) | | | | | | | | | | |

| Option Name | Description |
|---|---|
| Expanded Geocoding options: The following options enable additional geocoding functionality. | |
| Address point interpolation | <p>Address point interpolation uses a patented process that improves upon regular street segment interpolation by inserting point data into the interpolation process.</p> <p>Note: This feature is only for use with point-level geocoding.</p> <p>A match is first attempted using the loaded points data. If an exact point match is found in the points data, then searching ceases and the point match is returned. If an exact point match was not found, the Enterprise Tax Module attempts to find high and low boundary address points to use for address point interpolation.</p> |
| Minimum geocode quality: | |
| Do not fallback | Returns the centroid level requested and will not attempt to geocode to a higher level geographic centroid. |
| Street centroid | <p>If an input street address cannot be found using the street number and name, the Enterprise Tax Module then searches the input ZIP Code or city/state for the closest match. If the Enterprise Tax Module is able to locate the street, it returns a geocode along the matched street segment rather than the geocode for the entered ZIP Code or ZIP + 4.</p> <p>When using street locator geocoding, if no exact matching house number is found, a match code of either E029 (no matching range, single street segment found), or E030 (no matching range, multiple street segment) returns. For example, if you enter Main St and there are both an E Main St and a W Main St within the input ZIP Code, then an E030 returns and the location code returned is reflective of the input ZIP Code. The location code returned begins with a 'C' when matched to a single street segment, indicated by E029. The Enterprise Tax Module does not change the street name on the output address.</p> |
| Geographic centroid | If a definitive match cannot be made, the next higher level geographic centroid will be returned. |
| Boundary matching: The following options can be set when matching to a boundary file such as SPD, IPD, PAY, Place and MCD or user-defined. | |

| Option Name | Description | | | | | | | | |
|---|---|--------------|----------------------------------|-------------------|---------------------------------------|-------------|---|---------------|-----------------------------------|
| Distance units | <p>Specifies the units in which to measure distance. One of the following:</p> <table> <tr> <td data-bbox="641 424 703 449">Miles</td><td data-bbox="882 424 1241 449">Distances are measured in miles.</td></tr> <tr> <td data-bbox="641 466 768 492">Kilometers</td><td data-bbox="882 466 1299 492">Distances are measured in kilometers.</td></tr> <tr> <td data-bbox="641 508 698 534">Feet</td><td data-bbox="882 508 1323 534">Distances are measured in feet. (default)</td></tr> <tr> <td data-bbox="641 551 719 576">Meters</td><td data-bbox="882 551 1258 576">Distances are measured in meters.</td></tr> </table> | Miles | Distances are measured in miles. | Kilometers | Distances are measured in kilometers. | Feet | Distances are measured in feet. (default) | Meters | Distances are measured in meters. |
| Miles | Distances are measured in miles. | | | | | | | | |
| Kilometers | Distances are measured in kilometers. | | | | | | | | |
| Feet | Distances are measured in feet. (default) | | | | | | | | |
| Meters | Distances are measured in meters. | | | | | | | | |
| Default buffer widths | <p>Specifies the buffer width to use for tax district boundary files. The tax district boundary files are the Special Purpose District (SPD) file, the Insurance Premium District (IPD) file, the Payroll Tax District (PAY) file, the Personal Property Tax District (PTD) file and Place and MCD files.</p> <p>Specify the distance in the Tax district boundary field. The distance units used are specified in the Distance units field.</p> <p>The default buffer width that you specify here can be overridden on a record-by-record basis using the BufferWidth input field.</p> <p>For more information on buffers, see Buffering on page 14.</p> | | | | | | | | |
| User-defined boundary file buffer width | <p>Specifies the buffer width to use for user-defined boundary files. Specify the distance in the units of measurement specified in the Distance units option. For information on buffers, see Buffering on page 14. The default buffer width that you specify here can be overridden on a record-by-record basis using the BufferWidth input field.</p> <p>Note: To use buffers, the user-defined boundary file must support buffers.</p> | | | | | | | | |

Output Data Options

Data options control the data returned by Assign GeoTAX Info. [Table 5: Assign GeoTAX Info Data Options](#) on page 24 lists the output data options.

Table 5: Assign GeoTAX Info Data Options

| Option Name | Description | | | | | | | | |
|-------------------------------|---|----------------|---|---------------------------|---|-------------------|--|-------------|--|
| Include data | <p>Select one or more of the following to obtain the type of data you want returned. Assign GeoTAX Info groups the output fields into record types. If you do not want all of the fields in a record type returned, do not select the check box, and list only those fields you want returned in Extra Output Fields.</p> <ul style="list-style-type: none"> • Auxiliary File • Census • Latitude/Longitude • Payroll System Tax Codes • Tax Jurisdiction • User-defined Boundary <p>For a description of the fields in each output group, see Output on page 26.</p> <p>Note: If you select Payroll System Tax Codes, select Payroll Tax Districts under Tax district to obtain the best payroll system tax code match possible.</p> | | | | | | | | |
| Tax district | <p>Indicates the type of tax district information returned. If you do not want all of the fields in a tax district returned, do not select the check box, and list only those fields you want returned in Extra output fields.</p> <ul style="list-style-type: none"> • Insurance Premium Tax Districts • Payroll Tax Districts • Property Tax Districts • Special Purpose Tax Districts <p>For a description of the fields in each output group, see Output on page 26.</p> | | | | | | | | |
| Sales tax cross-reference key | <p>If you integrate Assign GeoTAX Info with third-party tax compliance software from Vertex or Taxware, select which vendor you use. This controls the value returned in the GeoTAXKey output field. One of the following:</p> <table> <tr> <td>Taxware</td> <td>Return the Taxware jurisdiction code for the address.</td> </tr> <tr> <td>Vertex MatchMaster</td> <td>Return the Vertex jurisdiction code for the address. Select this option if you obtained a MatchMaster file from Vertex.</td> </tr> <tr> <td>PBS Vertex</td> <td>Return the Vertex jurisdiction code for the address. Select this option if you obtained a Vertex file from Pitney Bowes.</td> </tr> <tr> <td>None</td> <td>Do not return either the Taxware or Vertex jurisdiction codes (default).</td> </tr> </table> | Taxware | Return the Taxware jurisdiction code for the address. | Vertex MatchMaster | Return the Vertex jurisdiction code for the address. Select this option if you obtained a MatchMaster file from Vertex. | PBS Vertex | Return the Vertex jurisdiction code for the address. Select this option if you obtained a Vertex file from Pitney Bowes. | None | Do not return either the Taxware or Vertex jurisdiction codes (default). |
| Taxware | Return the Taxware jurisdiction code for the address. | | | | | | | | |
| Vertex MatchMaster | Return the Vertex jurisdiction code for the address. Select this option if you obtained a MatchMaster file from Vertex. | | | | | | | | |
| PBS Vertex | Return the Vertex jurisdiction code for the address. Select this option if you obtained a Vertex file from Pitney Bowes. | | | | | | | | |
| None | Do not return either the Taxware or Vertex jurisdiction codes (default). | | | | | | | | |
| Tax rate type | <p>Indicates the sales and use tax rate type to return or None:</p> <table> <tr> <td>None</td> <td>Do not return sales and use tax rates. (default)</td> </tr> </table> | None | Do not return sales and use tax rates. (default) | | | | | | |
| None | Do not return sales and use tax rates. (default) | | | | | | | | |

| Option Name | Description |
|---------------------|--|
| General | Return the General sales and use tax rates. |
| Automotive | Return the Automotive sales and use tax rates. |
| Construction | Return the Construction sales and use tax rates. |
| Medical | Return the Medical sales and use tax rates. |

| | |
|----------------------|--|
| Include extra fields | Indicates the individual output fields you want returned. List fields with a pipe () between each field. You can use this field instead of the Output Record Type to limit the output to those fields that are important to your current data needs. For a list of the fields included in each data type, see Output on page 26. |
|----------------------|--|

Output Format

Output format options control how Assign GeoTAX Info formats output data. The following table lists the output format options.

Table 6: Assign GeoTAX Info Output Format Options

| Option Name | Description |
|-------------|---|
| Casing | Specifies the casing of these output fields: County.Name, CBSA.Name, MCD.Name, Place.Name, IPDn.DistrictName, PAYn.DistrictName, SPDn.DistrictName, and PTCn.PayrollDescription. One of the following: Mixed The output in mixed case (default). For example: Rensselaer. Upper The output in upper case. For example: RENSSELAER. |

Output

Result Indicators

The following table lists the results returned from the address matching and geocoding process.

Table 7: Address Matching and Geocoding Status Output Fields

| Field Name | Max. Field Length (bytes) | Description |
|------------------------|---------------------------|--|
| Confidence | 4 | <p>Indicates the confidence in the output provided; from 0 to 100. The higher the score, the higher the confidence in the match. Calculated based on the match results for individual output fields, using the following algorithm:</p> <p>Census.MatchCode + LatLong.StreetMatchCode + LatLong.MatchCode</p> <p>The maximum confidence score is 100, so if this calculation results in a value greater than 100, the Confidence score is returned as 100.</p> <p>Assign GeoTAX Info uses the following values:</p> <ul style="list-style-type: none"> • Census.MatchCode <ul style="list-style-type: none"> • A = 85 • G = 85 • S = 85 • U = 85 • 9 = 65 • 5 = 45 • null = 0 |
| Confidence.SurfaceType | 3 | <p>Indicates the confidence surface type. Setting a non-zero buffer width enables confidence generation. To determine a confidence level, a confidence surface is first generated. The confidence surface provides the smallest possible area wherein an address is likely to be located.</p> <p>0 Undefined</p> |

| Field Name | Max. Field Length (bytes) | Description |
|------------------------|---------------------------|---|
| | 1 | The search failed - the address was not found. |
| | 2 | Intersection confidence surface generated. |
| | 3 | Interpolated street segment. |
| | 4 | Point-level match. |
| | 5 | State confidence surface generated. |
| | 6 | County confidence surface generated. |
| | 7 | City confidence surface generated. |
| | 8 | Reserved |
| | 9 | A ZIP Code confidence surface generated. |
| | 10 | A ZIP+2 confidence surface generated. |
| | 11 | A ZIP+4 confidence surface generated. |
| | 12 | Reserved |
| | 13 | A street centroid confidence surface generated. |
| AddressMatch.MatchCode | 5 | <p>The Match Code indicates the portions of the address that matched or did not match to the reference file.</p> <p>For the list of match codes, see Match Codes.</p> |
| AddressMatch.GenRC | 2 | <p>General Return Code indicating the type of match.</p> <ul style="list-style-type: none"> 5 ZIP Code match 9 ZIP+4 Code match A User Auxiliary file match C Street Centroid match F Geographic Fallback match G State-supplied file match I Intersection match L Landmark Auxiliary file match M Multiple match (multi-match) O Input Latitude/Longitude coordinates match P Address point match S Street address match |

| Field Name | Max. Field Length (bytes) | Description | | | | | | | | | | | | | | |
|----------------------------|---|---|----------|------------------|----------|-----------------------|----------|----------------------|----------|---------------|----------|--------------|----------|---|----------|------------------------------|
| | X | Aborted processing or expired database | | | | | | | | | | | | | | |
| | Blank | Did not match | | | | | | | | | | | | | | |
| AddressMatch.DataTypeName | 20 | <p>Indicates the file from which the match was obtained. One of the following:</p> <ul style="list-style-type: none"> • USPS • TIGER • TOMTOM - Streets • NAVTEQ - Streets • TOMTOM_POINT • CENTRUS_POINT • NAVTEQ_POINT • MASTER LOCATION - Master Location Data • STATE_FILE • USER_AUXILIARY • LANDMARK_AUXILIARY | | | | | | | | | | | | | | |
| AddressMatch.NumCandidates | 2 | When there are multiple equally-scored matches, returns the number of multiple match candidates found. | | | | | | | | | | | | | | |
| AddressMatch.LocationCode | 5 | <p>The Location Code indicates the methodology used to complete the geocode and may also provide some information about the quality of the geocode.</p> <p>For the list of location codes, see Location Codes.</p> | | | | | | | | | | | | | | |
| LatLong.MatchCode | 2 | <p>Latitude/Longitude General Return Code. Denotes the level for which the geocode was determined.</p> <table> <tr> <td style="vertical-align: top; padding-right: 10px;">2</td><td>ZIP + 2 centroid</td></tr> <tr> <td style="vertical-align: top; padding-right: 10px;">4</td><td>ZIP + 4 Code centroid</td></tr> <tr> <td style="vertical-align: top; padding-right: 10px;">B</td><td>Block group centroid</td></tr> <tr> <td style="vertical-align: top; padding-right: 10px;">C</td><td>City centroid</td></tr> <tr> <td style="vertical-align: top; padding-right: 10px;">I</td><td>Intersection</td></tr> <tr> <td style="vertical-align: top; padding-right: 10px;">L</td><td>Match using the Landmark Auxiliary file</td></tr> <tr> <td style="vertical-align: top; padding-right: 10px;">O</td><td>Latitude/longitude was input</td></tr> </table> | 2 | ZIP + 2 centroid | 4 | ZIP + 4 Code centroid | B | Block group centroid | C | City centroid | I | Intersection | L | Match using the Landmark Auxiliary file | O | Latitude/longitude was input |
| 2 | ZIP + 2 centroid | | | | | | | | | | | | | | | |
| 4 | ZIP + 4 Code centroid | | | | | | | | | | | | | | | |
| B | Block group centroid | | | | | | | | | | | | | | | |
| C | City centroid | | | | | | | | | | | | | | | |
| I | Intersection | | | | | | | | | | | | | | | |
| L | Match using the Landmark Auxiliary file | | | | | | | | | | | | | | | |
| O | Latitude/longitude was input | | | | | | | | | | | | | | | |

| Field Name | Max. Field Length (bytes) | Description |
|-------------------------|---------------------------|---|
| | | <p>R Address-level based on street address</p> <p>S State centroid</p> <p>T Census tract centroid</p> <p>U Address-level match using the GeoTAX Auxiliary Database</p> <p>Z ZIP Code centroid based on a five-digit ZIP code</p> <p>null No latitude/longitude determined</p> |
| | | If the General Return Code (see Result Indicators) is "P" (point match), then the following are possible values and have the following meaning: |
| | | <p>0 Latitude/Longitude coordinates from User Dictionary.</p> <p>2 Latitude/Longitude coordinates from Parcel Centroid.</p> <p>4 Latitude/Longitude coordinates from Address Point.</p> <p>5 Latitude/Longitude coordinates from Structure Centroid.</p> <p>7 Latitude/Longitude coordinates from manually-placed Point.</p> <p>8 Latitude/Longitude coordinates from Front Door Point.</p> <p>9 Latitude/Longitude coordinates from Driveway Offset Point.</p> <p>A Latitude/Longitude coordinates from Street Access Point.</p> <p>B Latitude/Longitude coordinates from Base Parcel Point.</p> <p>C Latitude/longitude coordinates from Backfill Address Point.</p> <p>D Latitude/longitude coordinates from Virtual Address Point.</p> <p>E Latitude/longitude coordinates from Interpolated Address Point.</p> |
| LatLong.StreetMatchCode | 2 | <p>Output street address return code.</p> <p>H House number not found on street</p> <p>L Latitude/longitude not determined on auxiliary match</p> <p>S Street not found in ZIP Code</p> |

| Field Name | Max. Field Length (bytes) | Description |
|------------|---------------------------|---|
| | Z | ZIP Code not found in street address database |
| | N | Street-level matching option not selected |
| | null | The street was successfully matched |

Auxiliary File

The following table lists the output fields that contain auxiliary file data. To include auxiliary file data in the output, select the **Auxiliary** check box under Output Data. The following table lists the output fields that contain tax jurisdiction data.

Table 8: Auxiliary File Output Fields

| Field Name | Max. Field Length (bytes) | Description |
|-----------------------------|---------------------------|---|
| AuxiliaryData.AuxiliaryFile | 301 | Data retrieved as a result of an auxiliary match from the user-defined area of the auxiliary file. |
| AuxiliaryData.StateFile | 201 | Data retrieved as a result of a state match. Data content and format vary depending on the state file used. |

Census

The census output fields contains census information from the U.S. Census, including Minor Civil Divisions (MCDs) and Census County Division (CCD) names and codes. MCDs are the primary political or administrative divisions of a county, representing many kinds of legal entities with a variety of governmental and administrative functions. CCDs are established in states where there are no legally established MCDs. The Census Bureau recognizes MCDs in 28 states and has established CCDs in 21 states. The District of Columbia has no primary divisions, and the city of Washington, DC is considered equivalent to an MCD for data presentation purposes.

Census data also contains the Federal Information Processing Standards (FIPS) codes for each state and county. The FIPS State Code and the FIPS County Code are both used by the Census Bureau to identify these geographic units.

The following table lists the output fields that contain census data. To include census data in the output, select the **Census** check box under Output Data.

Table 9: Census Data Output Fields

| Field Name | Max. Field Length (bytes) | Description | | | | | | | | | | | | | | |
|-------------------|-----------------------------|---|------------------|------------------------|-------------|-----------------------------|---------------|----------------------|------------|-----------------------------|----------|--------------------------|----------|----------------------|-------------|--------------------|
| Census.Block | 4 | Census Block ID. | | | | | | | | | | | | | | |
| Census.BlockGroup | 2 | Census Block Group code. | | | | | | | | | | | | | | |
| Census.MatchCode | 2 | <p>The level of match obtained against the databases.</p> <p>Note: This field is always included in the output regardless of whether or not you choose to include census data in the output.</p> <table> <tr> <td>A</td><td>Auxiliary street match</td></tr> <tr> <td>G</td><td>State file address match</td></tr> <tr> <td>S</td><td>Street address match</td></tr> <tr> <td>U</td><td>GeoTAX Auxiliary file match</td></tr> <tr> <td>9</td><td>ZIP + 4 Code level match</td></tr> <tr> <td>5</td><td>ZIP Code level match</td></tr> <tr> <td>null</td><td>Unsuccessful match</td></tr> </table> | A | Auxiliary street match | G | State file address match | S | Street address match | U | GeoTAX Auxiliary file match | 9 | ZIP + 4 Code level match | 5 | ZIP Code level match | null | Unsuccessful match |
| A | Auxiliary street match | | | | | | | | | | | | | | | |
| G | State file address match | | | | | | | | | | | | | | | |
| S | Street address match | | | | | | | | | | | | | | | |
| U | GeoTAX Auxiliary file match | | | | | | | | | | | | | | | |
| 9 | ZIP + 4 Code level match | | | | | | | | | | | | | | | |
| 5 | ZIP Code level match | | | | | | | | | | | | | | | |
| null | Unsuccessful match | | | | | | | | | | | | | | | |
| Census.MatchLevel | 19 | <p>The level of match obtained against the databases.</p> <p>Note: This field is always included in the output regardless of whether or not you choose to include census data in the output.</p> <table> <tr> <td>Auxiliary</td><td>Auxiliary street match</td></tr> <tr> <td>Aux2</td><td>GeoTAX Auxiliary file match</td></tr> <tr> <td>Street</td><td>Street address match</td></tr> <tr> <td>Gov</td><td>State file address match</td></tr> </table> | Auxiliary | Auxiliary street match | Aux2 | GeoTAX Auxiliary file match | Street | Street address match | Gov | State file address match | | | | | | |
| Auxiliary | Auxiliary street match | | | | | | | | | | | | | | | |
| Aux2 | GeoTAX Auxiliary file match | | | | | | | | | | | | | | | |
| Street | Street address match | | | | | | | | | | | | | | | |
| Gov | State file address match | | | | | | | | | | | | | | | |

| Field Name | Max. Field Length (bytes) | Description |
|-----------------|---------------------------|---|
| | | ZIP+4 ZIP + 4 Code level match ZIP ZIP Code level match null No match |
| Census.Ttract | 7 | Six-digit tract number extracted from the Census.BlockCode. |
| County.Code | 4 | Three-digit Federal Information Processing Standards (FIPS) county code extracted from the Census.BlockCode. Note: This field is always included in the output regardless of whether or not you choose to include census data in the output. |
| County.Name | 26 | Name of the county. Note: This field is always included in the output regardless of whether or not you choose to include census data in the output. |
| MCD.Code | 6 | Minor Civil Division/Census County Division (MCD/CCD) Code. |
| MCD.Name | 41 | Minor Civil Division/Census County Division (MCD/CCD) name. |
| MCD.PointStatus | 2 | An address can be compared to a Minor Civil Division (MCD)/county subdivision file (Cousub.txt). This output field returns the result for a comparison between the matched address point to the polygon defined by the Cousub.txb file. For more information on buffers, see Buffering on page 14. Note: The buffer distance for Cousub.txb is internally set to zero and cannot be modified. |
| | | P The point is in the polygon. I The point is in the buffer area inside the polygon. B The point is in the buffer area and outside of the polygon. |

| Field Name | Max. Field Length (bytes) | Description |
|----------------------|---------------------------|--|
| | blank | Polygon not found. |
| MCD.DistanceToBorder | 10 | Returns the distance in feet between the matched address point to the polygon defined by the Cousub.txb file. |
| MCD.Confidence | 4 | Provides the percentage overlap of the geocode to the MCD polygon layer. The returned percentage value describes the probability that the point falls in the MCD. |
| CBSA.Code | 6 | Core Based Statistical Area (CBSA) code. |
| CBSA.Name | 76 | Core Based Statistical Area (CBSA) name. |
| CBSA.MetroFlag | 2 | <p>Indicates if the CBSA is a "Metropolitan Statistical Area" or a "Micropolitan Statistical Area".</p> <p>Y Metropolitan Statistical Area - A Core Based Statistical Area associated with at least one urbanized area that has a population of at least 50,000. The Metropolitan Statistical Area comprises the central county or counties containing the core, plus adjacent outlying counties having a high degree of social and economic integration with the central county as measured through commuting.</p> <p>N Micropolitan Statistical Area - A Core Based Statistical Area associated with at least one urban cluster that has a population of at least 10,000, but less than 50,000. The Micropolitan Statistical Area comprises the central county or counties containing the core, plus adjacent outlying counties having a high degree of social and economic integration with the central county as measured through commuting.</p> |
| CBSAD.Code | 6 | Core Based Statistical Area Division (CBSAD) code. |
| CBSAD.Name | 73 | Core Based Statistical Area Division (CBSAD) name. |

| Field Name | Max. Field Length (bytes) | Description |
|--------------------|---------------------------|---|
| CSA.Code | 4 | Combined Statistical Area (CSA) code. |
| CSA.Name | 78 | Combined Statistical Area (CSA) name. |
| State.Abbreviation | 3 | Two-character state abbreviation. Note: This field is always included in the output regardless of whether or not you choose to include census data in the output |
| StateCode | 3 | Two-digit Federal Information Processing Standards (FIPS) state code extracted from the Census.BlockCode. Note: This field is always included in the output regardless of whether or not you choose to include census data in the output. |

Latitude/Longitude

The following table lists the output fields that contain latitude and longitude data. Latitude/Longitude data contains the coordinates for the address and additional information about how Assign GeoTAX Info determined the latitude and longitude. To include latitude/longitude data in the output, select the **Latitude/Longitude** check box under Output Data.

Table 10: Latitude/Longitude Output Fields

| Field Name | Max. Field Length (bytes) | Description |
|------------|---------------------------|--|
| Latitude | 8 | Seven-digit number in degrees and calculated to four decimal places (in the format you specified). |

| Field Name | Max. Field Length (bytes) | Description |
|--------------------|---------------------------|--|
| Latitude.Direction | 2 | Latitude directional. N North S South |
| LatLong | 23 | Returned latitude/longitude, in the format you specified (up to 22 alphanumeric characters). |
| LatLong.MatchCode | 2 | Latitude/Longitude General Return Code. Denotes the level for which the geocode was determined. 2 ZIP + 2 centroid 4 ZIP + 4 Code centroid B Block group centroid C City centroid I Intersection L Match using the Landmark Auxiliary file O Latitude/longitude was input R Address-level based on street address S State centroid T Census tract centroid U Address-level match using the GeoTAX Auxiliary Database Z ZIP Code centroid based on a five-digit ZIP code null No latitude/longitude determined |
| | | If the General Return Code (see Result Indicators) is "P" (point match), then the following are possible values and have the following meaning: 0 Latitude/Longitude coordinates from User Dictionary. 2 Latitude/Longitude coordinates from Parcel Centroid. 4 Latitude/Longitude coordinates from Address Point. 5 Latitude/Longitude coordinates from Structure Centroid. 7 Latitude/Longitude coordinates from manually-placed Point. |

| Field Name | Max. Field Length (bytes) | Description | | | | | | | | | | | | | | | | | | | | | | | | |
|-------------------------|---|---|--------------|----------------------------------|--------------|--|--------------|----------------------|---------------------|---------------|---------------------|--------------------|--------------------|---|--------------------|---|----------------|---------------------|----------------------|----------------|--------------|-----------------------|------------------|---|------------|-------------------|
| | 8 | Latitude/Longitude coordinates from Front Door Point. | | | | | | | | | | | | | | | | | | | | | | | | |
| | 9 | Latitude/Longitude coordinates from Driveway Offset Point. | | | | | | | | | | | | | | | | | | | | | | | | |
| | A | Latitude/Longitude coordinates from Street Access Point. | | | | | | | | | | | | | | | | | | | | | | | | |
| | B | Latitude/Longitude coordinates from Base Parcel Point. | | | | | | | | | | | | | | | | | | | | | | | | |
| | C | Latitude/longitude coordinates from Backfill Address Point. | | | | | | | | | | | | | | | | | | | | | | | | |
| | D | Latitude/longitude coordinates from Virtual Address Point. | | | | | | | | | | | | | | | | | | | | | | | | |
| | E | Latitude/longitude coordinates from Interpolated Address Point. | | | | | | | | | | | | | | | | | | | | | | | | |
| LatLong.MatchLevel | 14 | <p>A description of the value returned in the LatLong.MatchCode field.</p> <table> <tbody> <tr> <td>ZIP+2</td> <td>ZIP + 2 centroid</td> </tr> <tr> <td>ZIP+4</td> <td>ZIP + 4 centroid</td> </tr> <tr> <td>Block</td> <td>Block group centroid</td> </tr> <tr> <td>CityCentroid</td> <td>City centroid</td> </tr> <tr> <td>Intersection</td> <td>Intersection match</td> </tr> <tr> <td>LandmarkAux</td> <td>Match using the Landmark Auxiliary file</td> </tr> <tr> <td>LatLonInput</td> <td>Input Latitude/Longitude coordinates was used</td> </tr> <tr> <td>Rooftop</td> <td>Exact address match</td> </tr> <tr> <td>StateCentroid</td> <td>State centroid</td> </tr> <tr> <td>Tract</td> <td>Census tract centroid</td> </tr> <tr> <td>Auxiliary</td> <td>Address-level match using the GeoTAX Auxiliary Database</td> </tr> <tr> <td>ZIP</td> <td>ZIP Code centroid</td> </tr> </tbody> </table> | ZIP+2 | ZIP + 2 centroid | ZIP+4 | ZIP + 4 centroid | Block | Block group centroid | CityCentroid | City centroid | Intersection | Intersection match | LandmarkAux | Match using the Landmark Auxiliary file | LatLonInput | Input Latitude/Longitude coordinates was used | Rooftop | Exact address match | StateCentroid | State centroid | Tract | Census tract centroid | Auxiliary | Address-level match using the GeoTAX Auxiliary Database | ZIP | ZIP Code centroid |
| ZIP+2 | ZIP + 2 centroid | | | | | | | | | | | | | | | | | | | | | | | | | |
| ZIP+4 | ZIP + 4 centroid | | | | | | | | | | | | | | | | | | | | | | | | | |
| Block | Block group centroid | | | | | | | | | | | | | | | | | | | | | | | | | |
| CityCentroid | City centroid | | | | | | | | | | | | | | | | | | | | | | | | | |
| Intersection | Intersection match | | | | | | | | | | | | | | | | | | | | | | | | | |
| LandmarkAux | Match using the Landmark Auxiliary file | | | | | | | | | | | | | | | | | | | | | | | | | |
| LatLonInput | Input Latitude/Longitude coordinates was used | | | | | | | | | | | | | | | | | | | | | | | | | |
| Rooftop | Exact address match | | | | | | | | | | | | | | | | | | | | | | | | | |
| StateCentroid | State centroid | | | | | | | | | | | | | | | | | | | | | | | | | |
| Tract | Census tract centroid | | | | | | | | | | | | | | | | | | | | | | | | | |
| Auxiliary | Address-level match using the GeoTAX Auxiliary Database | | | | | | | | | | | | | | | | | | | | | | | | | |
| ZIP | ZIP Code centroid | | | | | | | | | | | | | | | | | | | | | | | | | |
| LatLong.StreetMatchCode | 2 | <p>Output street address return code.</p> <table> <tbody> <tr> <td>H</td> <td>House number not found on street</td> </tr> <tr> <td>L</td> <td>Latitude/longitude not determined on auxiliary match</td> </tr> </tbody> </table> | H | House number not found on street | L | Latitude/longitude not determined on auxiliary match | | | | | | | | | | | | | | | | | | | | |
| H | House number not found on street | | | | | | | | | | | | | | | | | | | | | | | | | |
| L | Latitude/longitude not determined on auxiliary match | | | | | | | | | | | | | | | | | | | | | | | | | |

| Field Name | Max. Field Length (bytes) | Description | | | | | | | | | | | | |
|--------------------------|--|--|------------------|------------------|----------------------|----------------------------------|------------------------|--|-----------------------|------------------------------|--------------------|---|----------------|---|
| | S | Street not found in ZIP Code | | | | | | | | | | | | |
| | Z | ZIP Code not found in street address database | | | | | | | | | | | | |
| | N | Street-level matching option not selected | | | | | | | | | | | | |
| | null | The street was successfully matched | | | | | | | | | | | | |
| LatLong.StreetMatchLevel | | <p>Street level match used to determine the latitude/longitude</p> <table> <tr> <td>FullMatch</td><td>Successful match</td></tr> <tr> <td>HouseNotFound</td><td>House number not found on street</td></tr> <tr> <td>LatLongNotFound</td><td>Latitude/longitude not determined on auxiliary match</td></tr> <tr> <td>StreetNotFound</td><td>Street not found in ZIP Code</td></tr> <tr> <td>ZipNotFound</td><td>ZIP Code not found in street address database</td></tr> <tr> <td>NotUsed</td><td>Street-level matching option not selected</td></tr> </table> | FullMatch | Successful match | HouseNotFound | House number not found on street | LatLongNotFound | Latitude/longitude not determined on auxiliary match | StreetNotFound | Street not found in ZIP Code | ZipNotFound | ZIP Code not found in street address database | NotUsed | Street-level matching option not selected |
| FullMatch | Successful match | | | | | | | | | | | | | |
| HouseNotFound | House number not found on street | | | | | | | | | | | | | |
| LatLongNotFound | Latitude/longitude not determined on auxiliary match | | | | | | | | | | | | | |
| StreetNotFound | Street not found in ZIP Code | | | | | | | | | | | | | |
| ZipNotFound | ZIP Code not found in street address database | | | | | | | | | | | | | |
| NotUsed | Street-level matching option not selected | | | | | | | | | | | | | |
| Longitude | 8 | Seven-digit number in degrees and calculated to four decimal places (in the format specified). | | | | | | | | | | | | |
| Longitude.Direction | 2 | <p>Longitude directional.</p> <table> <tr> <td>E</td><td>East</td></tr> <tr> <td>W</td><td>West</td></tr> </table> | E | East | W | West | | | | | | | | |
| E | East | | | | | | | | | | | | | |
| W | West | | | | | | | | | | | | | |

Input Address

Assign GeoTAX Info always returns the input address as part of the output. The input address fields are returned as input from the data. Assign GeoTAX Info does not change these input values.

Table 11: Input Address Output Fields

| Field Name | Max. Field Length (bytes) | Description |
|---------------|---------------------------|---------------------------|
| AddressLine1 | 101 | Input address line 1. |
| AddressLine2 | 101 | Input address line 2. |
| AddressLine3 | 101 | Input address line 3. |
| AddressLine4 | 101 | Input address line 4. |
| City | 51 | Input address city. |
| Country | 25 | Input address country. |
| FirmName | 101 | Input address firm name. |
| PostalCode | 10 | Input address postal code |
| StateProvince | 51 | Input address state. |

Payroll System Tax Code

The following table lists the output fields that contain Payroll System Tax Code (PTC) data. For more information on payroll tax districts, see [Assign GeoTAX Info](#) on page 11. To include this data in the output, select **Payroll System Tax Codes** in the **Output Record Type** field.

Note: Assign GeoTAX Info returns up to six payroll tax codes per address.

Table 12: Payroll System Tax Code Output Fields

| Field Name | Max. Field Length (bytes) | Description |
|-------------------------|---------------------------|---|
| NumberPTCsFound | 2 | The number of payroll tax codes found for this address. |
| PTCn.MatchCode | 2 per PTC | <p>Indicates the level of match obtained for the address. In order from most specific match to least, the possible match codes are:</p> <ul style="list-style-type: none"> P The address was matched to a specific Payroll District ID. This is the most specific match. G The address was matched to a GNIS Code. F The address was matched to a county's FIPS code. S The address was matched to a state's FIPS code. This is the least specific match. |
| PTCn.PayrollCode | 16 per PTC | A code that represents a taxing authority in a payroll application. This is a user-defined code. The specific codes are determined by the payroll application that utilizes the data returned by Assign GeoTAX Info. |
| PTCn.PayrollDescription | 41 per PTC | A description of the purpose of this payroll code. |
| PTCn.PayrollFlag | 7 per PTC | A user-defined flag from the PTC database. |
| StateCounty | 33 | The state abbreviation and county name. |

Tax Jurisdiction

Tax jurisdiction data contains information about the "place" for the location. A "place" is a geographic area defined on the basis of population criteria that vary by state; or, an area recognized as significant because it is located in an incorporated municipality. Places are used to determine tax jurisdiction.

The following table lists the output fields that contain tax jurisdiction data. To include tax jurisdiction data in the output, select the **Tax Jurisdiction** check box under **Output Data**.

Table 13: Tax Jurisdiction Output Fields

| Field Name | Max. Field Length (bytes) | Description | | | | | | | | |
|----------------------|--|--|--------------|--|----------------|--|------------------|--|--------------------|--|
| GeoTAXKey | 10 | <p>The value in this field varies depending on the option you specified in the Sales tax cross-reference key option:</p> <p>If you specified Taxware, GeoTAXKey contains the proprietary codes used in Taxware tax compliance software. You can use this code in your Taxware application to find out the tax rate for the jurisdiction.</p> <p>If you specified Vertex MatchMaster or PBS Vertex, GeoTAXKey contains the proprietary Vertex® jurisdiction code (comprised of a two-digit Vertex® state code, three-digit FIPS county code, and four-digit Vertex® city code). You can use this code in your Vertex® application to find out the tax rate for the jurisdiction.</p> | | | | | | | | |
| GeoTAXKey.MatchCode | 2 | <p>Return code denoting the level of match obtained against the Vertex or Taxware cross reference files.</p> <p>E Exact match using five fields: FIPS state code, FIPS county code, FIPS or GNIS place code, ZIP Code, and FIPS place name.</p> <p>P Partial match using four fields: FIPS state code, FIPS county code, FIPS or GNIS place code, and ZIP Code.</p> <p>A Alternate match using two fields: ZIP Code, FIPS place name.</p> <p>N Record is default coded based on valid state code.</p> <p>null No matching record found.</p> | | | | | | | | |
| GeoTAXKey.MatchLevel | 12 | <p>A description of the value returned in the GeoTAXKey.MatchCode field.</p> <table> <tr> <td>Exact</td><td>Exact match. See description in GeoTAXKey.MatchCode.</td></tr> <tr> <td>Partial</td><td>Partial match. See description in GeoTAXKey.MatchCode.</td></tr> <tr> <td>Alternate</td><td>Alternate match. See description in GeoTAXKey.MatchCode.</td></tr> <tr> <td>DefaultCode</td><td>Record is default coded. See description in GeoTAXKey.MatchCode.</td></tr> </table> | Exact | Exact match. See description in GeoTAXKey.MatchCode. | Partial | Partial match. See description in GeoTAXKey.MatchCode. | Alternate | Alternate match. See description in GeoTAXKey.MatchCode. | DefaultCode | Record is default coded. See description in GeoTAXKey.MatchCode. |
| Exact | Exact match. See description in GeoTAXKey.MatchCode. | | | | | | | | | |
| Partial | Partial match. See description in GeoTAXKey.MatchCode. | | | | | | | | | |
| Alternate | Alternate match. See description in GeoTAXKey.MatchCode. | | | | | | | | | |
| DefaultCode | Record is default coded. See description in GeoTAXKey.MatchCode. | | | | | | | | | |

| Field Name | Max. Field Length (bytes) | Description | | | | | | |
|------------------------|-------------------------------|--|------------|--------------------------|--------------|----------------------------|----------------|-------------------------------|
| | | NoMatch No matching record found. | | | | | | |
| GNISCode | 10 | <p>Unique nine-digit Geographic Names Information System (GNIS) code.</p> <p>Note: This field is always included in the output regardless of whether or not you choose to include census data in the output.</p> | | | | | | |
| Place.ClassCode | 3 | <p>Place class code. Place class codes are used to determine the proper taxing jurisdictions</p> <p>Note: This field is always included in the output regardless of whether or not you choose to include tax jurisdiction data in the output.</p> | | | | | | |
| Place.Code | 6 | <p>An identifier for a specific place. A "place" is a geographic area defined on the basis of population criteria that vary by state. Or, an area recognized as significant because it is located in an incorporated municipality.</p> <p>Note: This field is always included in the output regardless of whether or not you choose to include tax jurisdiction data in the output.</p> | | | | | | |
| Place.IncorporatedFlag | 8 | <p>Indicates whether the address is located in an incorporated or unincorporated place. A "place" is a geographic area defined on the basis of population criteria that vary by state. Or, an area recognized as significant because it is located in an incorporated municipality.</p> <p>Note: This field is always included in the output regardless of whether or not you choose to include tax jurisdiction data in the output.</p> <table> <tr> <td>Inc</td><td>Incorporated place code.</td></tr> <tr> <td>Uninc</td><td>Unincorporated place code.</td></tr> <tr> <td>Unknown</td><td>Incorporation status unknown.</td></tr> </table> | Inc | Incorporated place code. | Uninc | Unincorporated place code. | Unknown | Incorporation status unknown. |
| Inc | Incorporated place code. | | | | | | | |
| Uninc | Unincorporated place code. | | | | | | | |
| Unknown | Incorporation status unknown. | | | | | | | |

| Field Name | Max. Field Length (bytes) | Description | | | | |
|------------------------|---|--|---|------------------------------|---|---|
| Place.LastAnnexedDate | 8 | <p>Last annexed date, in the format MM/YYYY, representing the month and year of the most recent boundary change or the most recent available boundary information.</p> <p>Note: This field is always included in the output regardless of whether or not you choose to include tax jurisdiction data in the output.</p> | | | | |
| Place.LastUpdatedDate | 8 | <p>Last updated date, in the format MM/YYYY, reflecting the month and year when TomTom updated the database to reflect attribute (name change, FIPS change, etc.) or boundary edits to the Place.</p> <p>Note: This field is always included in the output regardless of whether or not you choose to include tax jurisdiction data in the output.</p> | | | | |
| Place.LastVerifiedDate | 8 | <p>Last verified date, in the format MM/YYYY, representing the month and year that TomTom verified municipality change information.</p> <p>Note: This field is always included in the output regardless of whether or not you choose to include tax jurisdiction data in the output.</p> | | | | |
| Place.Name | 41 | <p>The name of the "place" where the address is located. A "place" is a geographic area defined on the basis of population criteria that vary by state. Or, an area recognized as significant because it is located in an incorporated municipality.</p> <p>Note: This field is always included in the output regardless of whether or not you choose to include tax jurisdiction data in the output.</p> | | | | |
| Place.PointStatus | 2 | <p>Returns the result for a comparison between the matched address point to the polygon defined by the Place.txb file.</p> <p>For more information on buffers, see Buffering on page 14.</p> <p>Note: The buffer distance for Place.txb is internally set to zero and cannot be modified.</p> <table> <tr> <td>P</td><td>The point is in the polygon.</td></tr> <tr> <td>I</td><td>The point is in the buffer area inside the polygon.</td></tr> </table> | P | The point is in the polygon. | I | The point is in the buffer area inside the polygon. |
| P | The point is in the polygon. | | | | | |
| I | The point is in the buffer area inside the polygon. | | | | | |

| Field Name | Max. Field Length (bytes) | Description |
|------------------------|---------------------------|---|
| | B | The point is in the buffer area and outside of the polygon. |
| | blank | Polygon not found. |
| | | Note: This field is always included in the output regardless of whether or not you choose to include tax jurisdiction data in the output. |
| Place.DistanceToBorder | 10 | Returns the distance between the matched address point to the polygon defined by the Place.txb file. |
| | | Note: This field is always included in the output regardless of whether or not you choose to include tax jurisdiction data in the output. |
| Place.Confidence | 4 | Provides the percentage overlap of the geocode to the Place polygon layer. The returned percentage value describes the probability that the point falls in the specified Place. |
| | | Note: This field is always included in the output regardless of whether or not you choose to include tax jurisdiction data in the output. |

User-Defined Boundary File

The following table lists the output fields that contain data returned from user-defined boundary files. To include this data in the output, select the **User-defined boundary file** check box under **Output Data**.

Note: Assign GeoTAX Info can return up to 10 user-defined areas for each input address.

Table 14: Output Fields for User-Defined Boundary Files

| Field Name | Max. Field Length (bytes) | Description |
|--|---------------------------|--|
| NumberUserBoundariesFound | 3 | The number of user-defined polygons found for the address. |
| UserBoundary n .BoundaryDescription | 51 per User Boundary | A description of the polygon. |
| UserBoundary n .BoundaryID | 11 per User Boundary | The ID of the polygon as specified in the user-defined boundary file. |
| UserBoundary n .BufferRelation | 2 per User Boundary | <p>Indicates where in the polygon the address resides in relation to the edge of the area.</p> <p>One of the following:</p> <ul style="list-style-type: none"> P The address is inside the polygon at a distance from the edge that is greater than the specified buffer width. Buffer width is specified either by the option Default Buffer Width or by the input field BufferSize. I The address is inside the polygon but is close to the edge. This indicates that the address is in the buffer area specified either by the option Default Buffer Width or by the input field BufferSize. B The address is outside the polygon but is close to the edge. This indicates that the address is in the buffer area specified either by the option Default Buffer Width or by the input field BufferSize. |
| | | For more information, see Buffering on page 14. |
| UserBoundary n .DistanceToBorder | 10 per User Boundary | Indicates the distance from the address to the border of the polygon. The distance is in the units specified by the option Distance Units . |
| UserBoundary n .SupplementalBoundaryID | 11 per User Boundary | A supplemental ID as specified in the user-defined boundary file. |

| Field Name | Max. Field Length (bytes) | Description |
|--------------------------------------|---------------------------|--|
| UserBoundary n .BoundaryConfidence | 4 per User Boundary | Provides the percentage overlap of the geocode to the User-defined boundary polygon layer. The returned percentage value describes the probability that the point falls in the User-defined boundary area. |

Insurance Premium Tax District

The following table lists the output fields that contain Insurance Premium Tax District (IPD) data. For more information on insurance premium tax districts, see [Assign GeoTAX Info](#) on page 11. To include IPD data in the output, select **Insurance Premium Tax District** in the Output Tax District field.

Note: Assign GeoTAX Info returns multiple districts for IPDs, SPDs, PTDs, and PAYs.

Table 15: Insurance Premium Tax District Output Fields

| Field Name | Max. Field Length (bytes) | Description |
|--|---------------------------|--|
| NumberIPDsFound | 3 | The number of Insurance Premium Tax Districts found for the address |
| IPD n .BoundaryBuffer.BufferRelation | 2 per IPD | <p>Indicates where in the district the address resides in relation to the edge of the district.</p> <p>One of the following:</p> <ul style="list-style-type: none"> P The address is inside the district at a distance from the edge that is greater than the specified buffer width. Buffer width is specified either by the option Default Buffer Width or by the input field BufferSize. I The address is inside the district but is close to the edge. This indicates that the address is in the buffer area specified either by the option Default Buffer Width or by the input field BufferSize. |

| Field Name | Max. Field Length (bytes) | Description |
|--------------------------------------|---------------------------|--|
| | | <p>B The address is outside the district but is close to the edge. This indicates that the address is in the buffer area specified either by the option Default Buffer Width or by the input field BufferWidth.</p> |
| | | <p>For more information, see Buffering on page 14.</p> |
| IPDn.BoundaryBuffer.DistanceToBorder | 10 per IPD | Indicates the distance from the address to the border of the district. |
| IPDn.BoundaryConfidence | 4 per IPD | Provides the percentage overlap of the geocode to the IPD boundary polygon layer. The returned percentage value describes the probability that the point falls in the IPD boundary area. |
| IPDn.DistrictID | 11 per IPD | IPD ID. |
| IPDn.DistrictName | 61 per IPD | IPD name. |
| IPDn.DistrictType | 7 per IPD | IPD district type. |
| IPDn.UpdateDate | 7 per IPD | IPD update date (MMYYYY). |
| IPDn.VersionDate | 7 per IPD | IPD compiled date (MMYYYY). |
| IPDn.Notes | 21 per IPD | Tax code descriptions. For example: 01, 33, A, B |
| IPDn.ChangeDate | 7 per IPD | IPD change date. |
| IPDn.EffectiveDate | 7 per IPD | MMDDYY - Identifies when district becomes active - State supplied For example: 010108 |

| Field Name | Max. Field Length (bytes) | Description |
|---------------------|---------------------------|---|
| IPDn.ExpirationDate | 7 per IPD | MMDDYY - Identifies when district becomes inactive - State supplied For example: 063009 |
| IPDn.FireRate | 21 per IPD | Format is dependent on associated flag For example: .13, 15.00 or 3;7 |
| IPDn.FireFlag | 6 per IPD | P - Percentage; .1 = 10%, .0575 = 5.75% F - Flat Fee dollar amount M - Multiple Percentages has a semi colon as a delimiter. 3;7 = "3% or 7%" |
| IPDn.CasualtyRate | 21 per IPD | Format is dependent on associated flag For example: .13, 15.00 or 3;7 |
| IPDn.CasualtyFlag | 6 per IPD | P - Percentage; .1 = 10%, .0575 = 5.75% F - Flat Fee dollar amount M - Multiple Percentages has a semicolon as a delimiter. 3;7 = "3% or 7%" |
| IPDn.VehicleRate | 21 per IPD | Format is dependent on associated flag Possible Values: .13, 15.00 or 3;7 |
| IPDn.VehicleFlag | 6 per IPD | P - Percentage; .1 = 10%, .0575 = 5.75% F - Flat Fee dollar amount M - Multiple Percentages has a semicolon as a delimiter. 3;7 = "3% or 7%" |
| IPDn.MarineRate | 21 per IPD | Format is dependent on associated flag For example: .13, 15.00 or 3;7 |

| Field Name | Max. Field Length (bytes) | Description |
|------------------|---------------------------|--|
| IPDn.MarineFlag | 6 per IPD | P - Percentage; .1 = 10%, .0575 = 5.75% F - Flat Fee dollar amount M - Multiple Percentages has a semicolon as a delimiter. 3;7 = "3% or 7%" |
| IPDn.HealthRate | 21 per IPD | Format is dependent on associated flag For example: .13, 15.00 or 3;7 |
| IPDn.HealthFlag | 6 per IPD | P - Percentage; .1 = 10%, .0575 = 5.75% F - Flat Fee dollar amount M - Multiple Percentages has a semicolon as a delimiter. 3;7 = "3% or 7%" |
| IPDn.LifeRate | 21 per IPD | Format is dependent on associated flag For example: .13, 15.00 or 3;7 |
| IPDn.LifeFlag | 6 per IPD | P - Percentage; .1 = 10%, .0575 = 5.75% F - Flat Fee dollar amount M - Multiple Percentages has a semicolon as a delimiter. 3;7 = "3% or 7%" |
| IPDn.OtherRate | 21 per IPD | Format is dependent on associated flag For example: .13, 15.00 or 3;7 |
| IPDn.OtherFlag | 6 per IPD | P - Percentage; .1 = 10%, .0575 = 5.75% F - Flat Fee dollar amount M - Multiple Percentages has a semicolon as a delimiter. 3;7 = "3% or 7%" |
| IPDn.MinimumRate | 21 per IPD | Format is dependent on associated flag Possible Values: .13, 15.00 or 3;7 |

| Field Name | Max. Field Length (bytes) | Description |
|------------------|---------------------------|--|
| IPDn.MinimumFlag | 6 per IPD | P - Percentage; .1 = 10%, .0575 = 5.75% F - Flat Fee dollar amount M - Multiple Percentages has a semicolon as a delimiter. 3;7 = "3% or 7%" |

Payroll Tax District

The following table lists the output fields that contain Payroll Tax District (PAY) data. For more information on payroll tax districts, see [Assign GeoTAX Info](#) on page 11. To include this data in the output, select **Payroll Tax District** in the **Output Tax District** field.

Note: Assign GeoTAX Info returns multiple districts for IPDs, SPDs, PTDs, and PAYs.

Table 16: Payroll Tax District Output Fields

| Field Name | Max. Field Length (bytes) | Description |
|------------------------------------|---------------------------|--|
| NumberPAYsFound | 3 | Number of PAYs returned. |
| PAYn.BoundaryBuffer.BufferRelation | 2 per PAY | Indicates where in the district the address resides in relation to the edge of the district. One of the following: <ul style="list-style-type: none"> P The address is inside the district at a distance from the edge that is greater than the specified buffer width. Buffer width is specified either by the option Default Buffer Width or by the input field BufferSize. I The address is inside the district but is close to the edge. This indicates that the address is in the buffer area specified either by the option Default Buffer Width or by the input field BufferSize. B The address is outside the district but is close to the edge. This indicates that the address is in the buffer area specified |

| Field Name | Max. Field Length (bytes) | Description |
|--------------------------------------|---------------------------|--|
| | | either by the option Default Buffer Width or by the input field BufferWidth . For more information, see Buffering on page 14. |
| PAYn.BoundaryBuffer.DistanceToBorder | 10 per PAY | Indicates the distance from the address to the border of the district. The distance is in the units specified by the option Distance Units . |
| PAYn.BoundaryConfidence | 4 per PAY | Provides the percentage overlap of the geocode to the PAY boundary polygon layer. The returned percentage value describes the probability that the point falls in the PAY boundary area. |
| PAYn.DistrictID | 11 per PAY | PAY district ID. |
| PAYn.DistrictName | 61 per PAY | PAY district name. |
| PAYn.DistrictType | 7 per PAY | PAY district type. |
| PAYn.ID | 11 per PAY | PAY ID. |
| PAYn.MunicipalEMSTax | 2 per PAY | PAY municipality emergency municipal services tax. The values for Pennsylvania are: Y Levies the tax N Does not levy the tax All other states are null. |
| PAYn.MunicipalIncomeTax | 2 per PAY | PAY municipality income tax. The values for Pennsylvania are: R Resident N Non-resident |

| Field Name | Max. Field Length (bytes) | Description |
|------------------------------|---------------------------|---|
| | B | Both |
| | X | None |
| | | All other states are null. |
| PAYn.SchoolDistrictEMSTax | 2 per PAY | <p>PAY school district emergency municipal services tax.</p> <p>The Values for Pennsylvania are:</p> <p>Y Levies the tax</p> <p>N Does not levy the tax</p> <p>All other states are null.</p> |
| PAYn.SchoolDistrictIncomeTax | 2 per PAY | <p>PAY school district income tax.</p> <p>The values for Pennsylvania are:</p> <p>R Resident</p> <p>N Non-resident</p> <p>B Both</p> <p>X N</p> <p>The values for Ohio are:</p> <p>R Resident</p> <p>X None</p> <p>All other states are null.</p> |

Property Tax District

The following table lists the output fields that contain Property Tax District (PTD) data. For more information on property tax districts, see [Assign GeoTAX Info](#) on page 11. To include this data in the output, select the **Property Tax District** check box in the **Output Tax District** field.

Note: Assign GeoTAX Info returns multiple districts for IPDs, SPDs, PTDs, and PAYs.

Table 17: Property Tax District Output Fields

| Field Name | Max. Field Length (bytes) | Description |
|--------------------------------------|---------------------------|---|
| NumberPTDsFound | 3 | Number of PTDs returned. |
| PTDn.BoundaryBuffer.BufferRelation | 2 per PTD | <p>Indicates where in the district the address resides in relation to the edge of the district.</p> <p>One of the following:</p> <ul style="list-style-type: none"> P The address is inside the district at a distance from the edge that is greater than the specified buffer width. Buffer width is specified either by the option Default Buffer Width or by the input field BufferSize. I The address is inside the district but is close to the edge. This indicates that the address is in the buffer area specified either by the option Default Buffer Width or by the input field BufferSize. B The address is outside the district but is close to the edge. This indicates that the address is in the buffer area specified either by the option Default Buffer Width or by the input field BufferSize. <p>For more information, see Buffering on page 14.</p> |
| PTDn.BoundaryBuffer.DistanceToBorder | 10 per PTD | Indicates the distance from the address to the border of the district. The distance is in the units specified by the option Distance Units . |
| PTDn.BoundaryConfidence | 4 per PTD | Provides the percentage overlap of the geocode to the PTD boundary polygon layer. The returned percentage value describes the probability that the point falls in the PTD boundary area. |
| PTDn.DistrictID | 11 per PTD | PTD district ID. |
| PTDn.DistrictName | 61 per PTD | PTD district name. |
| PTDn.DistrictType | 2 per PTD | PTD district type. Only returned for Indiana. |

| Field Name | Max. Field Length (bytes) | Description |
|---------------------|---------------------------|----------------------|
| | R | Reporting district |
| | B | Billing district |
| PTDn.JurisdictionID | 11 per PTD | PTD jurisdiction ID. |
| PTDn.UpdateDate | 7 per PTD | PTD update date. |

Special Purpose Tax District

The following table lists the output fields that contain Special Purpose Tax District (SPD) data. For more information on special purpose tax districts, see [Assign GeoTAX Info](#) on page 11. To include this data in the output, select **Special Purpose Tax District** in the **Output Tax District** field.

Note: Assign GeoTAX Info returns multiple districts for IPDs, SPDs, PTDs, and PAYs.

Table 18: Special Purpose Tax District Output Fields

| Field Name | Max. Field Length (bytes) | Description |
|------------------------------------|---------------------------|---|
| NumberSPDsFound | 3 | Number of SPDs returned. |
| SPDn.BoundaryBuffer.BufferRelation | 2 per SPD | <p>Indicates where in the district the address resides in relation to the edge of the district.</p> <p>One of the following:</p> <ul style="list-style-type: none"> P The address is inside the district at a distance from the edge that is greater than the specified buffer width. Buffer width is specified either by the option Default Buffer Width or by the input field BufferWidth. I The address is inside the district but is close to the edge. This indicates that the address is in the buffer area specified |

| Field Name | Max. Field Length (bytes) | Description |
|--------------------------------------|---------------------------|---|
| | | <p>either by the option Default Buffer Width or by the input field BufferWidth.</p> <p>B The address is outside the district but is close to the edge. This indicates that the address is in the buffer area specified either by the option Default Buffer Width or by the input field BufferWidth.</p> <p>For more information, see Buffering on page 14.</p> |
| SPDn.BoundaryBuffer.DistanceToBorder | 10 per SPD | Indicates the distance from the address to the border of the district. The distance is in the units specified by the option Distance Units . |
| SPDn.BoundaryConfidence | 4 per SPD | Provides the percentage overlap of the geocode to the SPD boundary polygon layer. The returned percentage value describes the probability that the point falls in the SPD boundary area. |
| SPDn.CompiledDate | 7 per SPD | SPD compiled date. |
| SPDn.DistrictCode | 4 per SPD | 3-digit district type code. |
| SPDn.DistrictName | 61 per SPD | SPD name. |
| SPDn.DistrictNumber | 6 per SPD | SPD district number. |
| SPDn.EffectiveDate | 7 per SPD | SPD effective date. |
| SPDn.UpdateDate | 7 per SPD | SPD update date. |
| SPDn.VersionDate | 7 per SPD | SPD version date. |

Sales and Use Tax Rates

The following table lists the output fields that contain the sales and use tax rate data.

To include this data in the output, use the **Sales tax rate type** dropdown menu to select one of the following:

- General,
- Automotive,
- Construction, or
- Medical

Table 19: Sales and Use Tax Rate Output Fields

| Field Name | Max. Field Length (bytes) | Description | | | | | | | | | | |
|------------------------|--|--|----------|---------------------------------|----------|-------------------------------|----------|---------------------------------|----------|--|--------------|--|
| TaxRate.RC | 2 | <p>Tax Rate return code denoting the level of match obtained against the Pitney Bowes Software Sales and Use Tax Rate file:</p> <table> <tr> <td>E</td><td>Exact match, using all 5 fields</td></tr> <tr> <td>P</td><td>Partial match, using 4 fields</td></tr> <tr> <td>A</td><td>Alternate match, using 3 fields</td></tr> <tr> <td>N</td><td>Record is default-coded based on valid state code.</td></tr> <tr> <td>Blank</td><td>No matching PB Software Sales and Use Tax Rate record found.</td></tr> </table> | E | Exact match, using all 5 fields | P | Partial match, using 4 fields | A | Alternate match, using 3 fields | N | Record is default-coded based on valid state code. | Blank | No matching PB Software Sales and Use Tax Rate record found. |
| E | Exact match, using all 5 fields | | | | | | | | | | | |
| P | Partial match, using 4 fields | | | | | | | | | | | |
| A | Alternate match, using 3 fields | | | | | | | | | | | |
| N | Record is default-coded based on valid state code. | | | | | | | | | | | |
| Blank | No matching PB Software Sales and Use Tax Rate record found. | | | | | | | | | | | |
| Municipal.SalesTaxRate | 11 | Municipality sales tax rate for the selected tax rate type. | | | | | | | | | | |
| County.SalesTaxRate | 11 | County sales tax rate for the selected tax rate type. | | | | | | | | | | |
| State.SalesTaxRate | 11 | State sales tax rate for the selected tax rate type. | | | | | | | | | | |
| SPDn.SalesTaxRate | 11 per SPD | Sales tax rate for up to 10 Special Purpose Districts (SPD). | | | | | | | | | | |

| Field Name | Max. Field Length (bytes) | Description |
|----------------------|---------------------------|---|
| TaxRate.SalesTotal | 11 | The sum of the individual Municipal, County, State and SPD sales tax rates. |
| Municipal.UseTaxRate | 11 | Municipality use tax rate for the selected tax rate type. |
| County.UseTaxRate | 11 | County use tax rate for the selected tax rate type. |
| State.UseTaxRate | 11 | State use tax rate for the selected tax rate type. |
| SPDn.UseTaxRate | 11 per SPD | Use tax rate for up to 10 Special Purpose Districts (SPD). |
| TaxRate.UseTotal | 11 | The sum of the individual Municipal, County, State and SPD use tax rates. |

Error Reporting

The following table defines the error reporting output fields.

Table 20: Error Output Fields

| Field Name | Max. Field Length (bytes) | Description |
|---------------|---------------------------|---|
| GTX.ErrorCode | 3 | <p>This field contains a return code if the GeoTAX engine experiences an abnormal termination.</p> <p>Note: This field contains the same set of codes returned by the standalone GeoTAX software and is intended for users who have migrated from GeoTAX to Spectrum™ Technology Platform.</p> |

The first character indicates the file (or set of files affected).

| Field Name | Max. Field Length (bytes) | Description |
|----------------------|---------------------------|--|
| | | Blank Matcher terminated normally |
| | | A User Auxiliary file problem |
| | | CE coubsub.txb file problem |
| | | CI Confidence engine problem |
| | | D Boundary file |
| | | F User-defined boundary file problem |
| | | G Address Matching engine problem |
| | | L Licensing problem |
| | | S State file problem |
| | | U GeoTAX Auxiliary file problem |
| | | X Combination of Street and state file problem |
| | | Z zip.gsb file problem |
| | | The second position is one of the following: |
| | | E Fatal issue, program terminating |
| | | F Expired database |
| | | I Informational |
| GTX.ErrorDescription | 81 | <p>If the GeoTAX engine experiences an abnormal termination, this field contains a text description of the reason. It is blank if GeoTAX terminated normally.</p> <p>Note: This field contains the same set of descriptions returned by the standalone GeoTAX software and is intended for users who have migrated from GeoTAX to Spectrum™ Technology Platform.</p> <p>SI-"TS158 FILES NOT FOUND" SI-"TS158 FILES VINTAGE OR INCOMPLETE DB ERROR" SI-"STATE FILES NOT FOUND" SE-"STATE AND TS158 FILES NOT FOUND" SE-"STATE NOT FOUND AND TS158 VINTAGE ERROR" SI-"STATE FILES VINTAGE OR INCOMPLETE DB ERROR" SE-"STATE VINTAGE ERROR AND TS158 NOT FOUND" SE-"STATE AND TS158 FILES VINTAGE OR INCOMPLETE DB ERROR" GI-"STREET FILES NOT FOUND" XI-"STREET AND TS158 FILES NOT FOUND"</p> |

| Field Name | Max. Field Length (bytes) | Description |
|--------------|---------------------------|--|
| | | XI-"STREET NOT FOUND AND TS158 FILES VINTAGE ERROR" XI-"STREET AND STATE FILES NOT FOUND" XE-"STREET STATE AND TS158 FILES NOT FOUND" XE-"STREET AND STATE NOT FOUND AND TS158 VINTAGE ERROR" XI-"STREET NOT FOUND AND STATE VINTAGE ERROR" XE-"STREET AND TS158 NOT FOUND AND STATE VINTAGE ERROR" XE-"STREET NOT FOUND AND STATE AND TS158 VINTAGE ERROR" GI-"STREET FILES VINTAGE OR INCOMPLETE DB ERROR" XI-"STREET VINTAGE ERROR AND TS158 NOT FOUND" XI-"STREET AND TS158 FILES VINTAGE OR INCOMPLETE DB ERROR" XI-"STREET VINTAGE ERROR AND STATE NOT FOUND" XE-"STREET VINTAGE ERROR AND STATE AND TS158 NOT FOUND" XE-"STREET AND TS158 VINTAGE ERROR AND STATE NOT FOUND" XI-"STREET AND STATE FILES VINTAGE OR INCOMPLETE DB ERROR" XE-"STREET AND STATE VINTAGE ERROR AND TS158 NOT FOUND" XE-"STREET STATE AND TS158 VINTAGE ERROR" LF-"INVALID FUNCTION PASSED TO GTDBLIO : " AI-"GENIO ERROR: FILE = G1GTAUX , FUNC = , ST = " UI-"GENIO ERROR: FILE = G1GTAX2 , FUNC = , ST = " XF-"The (DB Vintage) database has expired!" XF-"The (SPD file Vintage) SPD File has expired!" DI- "UNABLE TO VALIDATE BOUNDARY LICENSE" DI- "UNABLE TO OPEN BOUNDARY FILE" DI- "BOUNDARY FILE NOT FOUND" FI- "UNABLE TO VALIDATE USER BOUNDARY LICENSE" FI- "UNABLE TO OPEN USER BND FILE" FI- "USER BND FILE NOT FOUND" |
| GTX.WarnCode | 3 | This field contains warning codes returned by the GeoTAX engine. It is blank if no warnings were issued. A value of WN indicates a database will expire next month. Note: This field contains the same set of codes returned by the standalone GeoTAX software and is intended for users who have migrated from GeoTAX to Spectrum™ Technology Platform. |

| Field Name | Max. Field Length (bytes) | Description |
|---------------------|---------------------------|--|
| GTX.WarnDescription | 81 | <p>A text description of any warnings returned by the GeoTAX engine.</p> <p>Note: This field contains the same set of descriptions returned by the standalone GeoTAX software and is intended for users who have migrated from GeoTAX to Spectrum™ Technology Platform.</p> |
| Status | 2 | <p>Reports the success or failure of the match attempt.</p> <p>null Success</p> <p>F Failure. Some examples of failures are your license expired or you did not select any output record types and fields for Assign GeoTAX Info to return.</p> |
| Status.Code | 12 | If Assign GeoTAX Info could not process the address, this field will show the reason. Currently there is one possible value for this field: Invalid Address. |
| Status.Description | 64 | <p>If Assign GeoTAX Info could not process the address, this field will show a description of the failure. One of the following:</p> <p>TS158 FILES NOT FOUND TS158 FILES VINTAGE OR INCOMPLETE DB ERROR STATE FILES NOT FOUND STATE AND TS158 FILES NOT FOUND STATE NOT FOUND AND TS158 VINTAGE ERROR STATE FILES VINTAGE OR INCOMPLETE DB ERROR STATE VINTAGE ERROR AND TS158 NOT FOUND STATE AND TS158 FILES VINTAGE OR INCOMPLETE DB ERROR STREET FILES NOT FOUND STREET AND TS158 FILES NOT FOUND STREET NOT FOUND AND TS158 FILES VINTAGE ERROR STREET AND STATE FILES NOT FOUND STREET STATE AND TS158 FILES NOT FOUND STREET AND STATE NOT FOUND AND TS158 VINTAGE ERROR STREET NOT FOUND AND STATE VINTAGE ERROR STREET AND TS158 NOT FOUND AND STATE VINTAGE ERROR STREET NOT FOUND AND STATE AND TS158 VINTAGE ERROR STREET FILES VINTAGE OR INCOMPLETE DB ERROR STREET VINTAGE ERROR AND TS158 NOT FOUND</p> |

| Field Name | Max. Field Length (bytes) | Description |
|------------|---------------------------|---|
| | | STREET AND TS158 FILES VINTAGE OR INCOMPLETE DB ERROR |
| | | STREET VINTAGE ERROR AND STATE NOT FOUND |
| | | STREET VINTAGE ERROR AND STATE AND TS158 NOT FOUND |
| | | STREET AND TS158 VINTAGE ERROR AND STATE NOT FOUND |
| | | STREET AND STATE FILES VINTAGE OR INCOMPLETE DB ERROR |
| | | STREET AND STATE VINTAGE ERROR AND TS158 NOT FOUND |
| | | STREET STATE AND TS158 VINTAGE ERROR |
| | | INVALID FUNCTION PASSED TO GTDBLIO : |
| | | GENIO ERROR: FILE = G1GTAUX , FUNC = , ST = |
| | | GENIO ERROR: FILE = G1GTAX2 , FUNC = , ST = |
| | | The (DB Vintage) database has expired! |
| | | The (SPD file Vintage) SPD File has expired! |
| | | UNABLE TO VALIDATE BOUNDARY LICENSE |
| | | UNABLE TO OPEN BOUNDARY FILE |
| | | BOUNDARY FILE NOT FOUND |
| | | UNABLE TO VALIDATE USER BOUNDARY LICENSE |
| | | UNABLE TO OPEN USER BND FILE |
| | | USER BND FILE NOT FOUND |

3 - Calculate Distance

In this section

| | |
|--------------------|----|
| Calculate Distance | 62 |
| Input | 62 |
| Options | 63 |
| Output | 64 |

Calculate Distance

Calculate Distance takes two sets of latitude/longitude coordinates as input, calculates the distance between the coordinates, and returns the distance between the two points.

Calculate Distance is part of the Enterprise Tax Module.

Input

Calculate Distance takes latitude and longitude information as input.

Note: If you are using the API, specify input using the `DataTable` class. The fields described below are the valid column names in the `DataTable` class. For information on the `DataTable` class, see the "API Fundamentals" section of the *Spectrum™ Technology Platform API Guide*.

Table 21: Calculate Distance Input Data

| Field Name | Description | |
|--------------------------|--|-------|
| FirstLatitude | Latitude of the first point for which you want distance returned. | |
| FirstLatitude.Direction | First latitude directional. | |
| | N | North |
| | S | South |
| FirstLongitude | Longitude of the first point for which you want distance returned. | |
| FirstLongitude.Direction | First longitude directional. | |
| | E | East |
| | W | West |

| Field Name | Description | |
|---------------------------|---|-------|
| SecondLatitude | Latitude of the second point for which you want distance returned. | |
| SecondLatitude.Direction | Second latitude directional. | |
| | N | North |
| | S | South |
| SecondLongitude | Longitude of the second point for which you want distance returned. | |
| SecondLongitude.Direction | Second longitude directional. | |
| | E | East |
| | W | West |

Options

Table 22: Output Data and Format Options

| Option Name | Description | |
|---------------------------------|--|---|
| Input latitude/longitude format | Indicates the format of the input latitude/longitude. The options are: | |
| | Degrees, minutes, seconds | For example 90 00 00N180 00 00W. |
| | Decimal degrees | Latitude/longitude in decimal degrees. |
| | Include decimal point | If not selected, indicates that the input value is similar to 90000000-180000000 or 090000000N180000000W. If selected, indicates that the input value is similar to 90.000000-180.000000 or 090.000000N180.000000W) |
| | Use directional indicator (N,S,E,W) | If selected, indicates that the input value is similar to 090000000N180000000W or 090.000000N180.000000. |

| Option Name | Description |
|--------------------------------------|---|
| Use signed latitude/longitude | If selected, indicates that the input value is similar to 90000000-18000000 or 90.000000-180.000000 |
| Return distance in | Indicates the measurement units returned for distance calculation: <ul style="list-style-type: none">• Miles• Kilometers• Feet• Meters |

Output

Calculate Distance always returns the Confidence field to indicate the confidence in the output provided.

If Calculate Distance fails to process the data, it returns the fields Status, Status.Code, and Status.Descriptions. These fields provide information on why Calculate Distance failed to process the data. Some examples of failures are your license expired or you did not select any output record types and fields for Calculate Distance to return. The following table provides the record-level qualifiers and data outputs for Calculate Distance.

Table 23: Calculate Distance Output Fields

| Field Name | Max. Field Length (bytes) | Description |
|------------|---------------------------|--|
| Distance | 9 | Distance between the two input coordinates in the units of measurement that you specified. |
| Status | 2 | Reports the success or failure of the match attempt: null Success F Failure |

| Field Name | Max. Field Length (bytes) | Description |
|--------------------|------------------------------------|---|
| Status.Code | 2 | Reason for failure or error. If Status = F, Status.Code = Failure. |
| Status.Description | 64 | Description of the problem. If Status = F, Status.Description = Unable to compute distance. |

4 - Reverse GeoTAX Info Lookup

In this section

| | |
|----------------------------|----|
| Reverse GeoTAX Info Lookup | 67 |
| Geocoding Options | 69 |
| Output Data Options | 70 |
| Output | 72 |

Reverse GeoTAX Info Lookup

Reverse GeoTAX InfoLookup allows latitude/longitude coordinates to be supplied as input and identifies the tax districts that apply to the given coordinate. Specifically, Reverse GeoTAX Info Lookup can return the following information about a location:

- FIPS state codes and county codes
- State and county names
- MCD codes and names
- Place codes and names
- Boundary file districts
- Cross-reference tax keys
- The relationship of the input coordinates to user-defined polygons
- Sales and use tax rates, if licensed for the Pitney Bowes Software Sales and Use Tax Rate File

Reverse GeoTAX Info Lookup optionally includes enhanced tax jurisdiction information for a location, including:

- **Insurance premium districts**—Areas designated for the collection of taxes imposed on insurance policy premiums, based on the policy holder's address. Insurance premium districts are created by state governments.

- **Payroll tax districts**—Areas designated for the collection of taxes imposed on employers to support state or local government facilities and services, based on the employee's and/or employer's address. Examples include taxes collected for districts to pay for schools, police, or other services. Payroll tax districts are created by state or local governments.

- **Payroll system tax codes**—Codes that represent specific jurisdictions that collect payroll tax. Using payroll system tax codes has advantages over using the payroll tax district information returned by Reverse GeoTAX Info Lookup:

- Reverse GeoTAX Info Lookup uses an additional database to determine payroll tax codes, resulting in more accurate payroll tax determination.
- Many payroll systems use specific codes to determine withholding amounts. Since you can customize the payroll tax codes returned by Reverse GeoTAX Info Lookup, you can set up a process where Reverse GeoTAX Info Lookup returns the exact payroll tax codes required by your payroll system, instead of returning jurisdictional IDs that must then be translated into the codes used by your system.

- **Property tax districts**—Areas designated for the collection of taxes imposed on property owners to support local government facilities and services, based on the property's location. Examples include taxes collected for districts to pay for schools, police, or other services. Property tax districts are created by local governments.

- **Special purpose tax districts**—Areas designated for the collection of taxes imposed on residents to support specialized services for residents of the district, based on the resident's address.

Examples include services such as sewer service, transit service, or water resources. Special purpose tax districts are created by legislative action, court action, or public referendums. This optional information requires the use of boundary files which require an additional license. Contact your Pitney Bowes sales representative for more information.

Using the optional Pitney Bowes Sales and Use Tax Rate file, Reverse GeoTAX Info Lookup includes tax rate data for a location, including:

Tax rate type:

- General
- Automotive
- Medical
- Construction

Sales and/or use tax rates for:

- State
- County
- Municipality
- Up to 10 SPDs
- Total Rate - the sum of the individual state, county, municipality and SPD rates.

Required input format

The required format for the input coordinates is as follows:

Table 24: Required Input Latitude/Longitude Format

| Field Name | Format |
|----------------|--|
| InputLatitude | 00.000000 or without the decimal point 00000000 |
| InputLongitude | 000.000000 or without the decimal point 000000000, or 00.000000 or without the decimal point 00000000 |

Reverse GeoTAX Info Lookup is part of the Enterprise Tax Module.

Geocoding Options

Reverse geocoding information lookup is the process of taking an input latitude/longitude coordinate and returning jurisdictional tax information. The geocoding options define the database to use for matching and specify the distance units and buffer distance to use when matching to a boundary file.

Table 25: Reverse GeoTAX Info Lookup Geocoding Options

| Option Name | Description | | | | | | | | |
|--|--|-------------|---|-------------------|---------------------------------------|---------------|-----------------------------------|--------------|----------------------------------|
| Database | Select the database resource to use in the reverse geocoding lookup process. | | | | | | | | |
| Boundary matching: The following options can be set when matching to a boundary file such as SPD, IPD, PAY, Place and MCD, or user-defined. | | | | | | | | | |
| Distance units | <p>Specifies the units in which to measure distance. One of the following:</p> <table> <tr> <td>Feet</td><td>Distances are measured in feet. (Default)</td></tr> <tr> <td>Kilometers</td><td>Distances are measured in kilometers.</td></tr> <tr> <td>Meters</td><td>Distances are measured in meters.</td></tr> <tr> <td>Miles</td><td>Distances are measured in miles.</td></tr> </table> | Feet | Distances are measured in feet. (Default) | Kilometers | Distances are measured in kilometers. | Meters | Distances are measured in meters. | Miles | Distances are measured in miles. |
| Feet | Distances are measured in feet. (Default) | | | | | | | | |
| Kilometers | Distances are measured in kilometers. | | | | | | | | |
| Meters | Distances are measured in meters. | | | | | | | | |
| Miles | Distances are measured in miles. | | | | | | | | |
| Default buffer widths | <p>Specifies the buffer width to use for tax district boundary files. The tax district boundary files are the Special Purpose District (SPD) file, the Insurance Premium District (IPD) file, the Payroll Tax District (PAY) file, the Personal Property Tax District (PTD) file, Place and MCD files.</p> <p>Specify the distance in the Tax district boundary field. The distance units used are specified in the Distance units field.</p> <p>The default buffer width that you specify here can be overridden on a record-by-record basis using the BufferWidth input field.</p> <p>For more information on buffers, see Buffering on page 14.</p> | | | | | | | | |
| User-defined boundary file buffer | Specifies the buffer width to use for user-defined boundary files. Specify the distance in the units of measurement specified in the Distance units option. For information on buffers, see Buffering on page 14. The default buffer width that you specify here can be overridden on a record-by-record basis using the BufferWidth input field. | | | | | | | | |

| Option Name | Description |
|---|-------------|
| Note: To use buffers, the user-defined boundary file must support buffers. | |

Output Data Options

Data options control the data returned by Reverse GeoTAX Info Lookup. [Table 26: Reverse GeoTAX Info Lookup Data Options](#) on page 70 lists the output data options.

Table 26: Reverse GeoTAX Info Lookup Data Options

| Option Name | Description |
|--------------|---|
| Include data | <p>Select one or more of the following to obtain the type of data you want returned. Reverse GeoTAX Info Lookup groups the output fields into record types. If you do not want all of the fields in a record type returned, do not select the check box, and list only those fields you want returned in Extra Output Fields.</p> <ul style="list-style-type: none"> • Auxiliary File • Census • Payroll System Tax Codes • Tax Jurisdiction • User-defined Boundary <p>For a description of the fields in each output group, see Output on page 72.</p> <p>Note: If you select Payroll System Tax Codes, select Payroll Tax Districts under Tax district to obtain the best payroll system tax code match possible.</p> |
| Tax district | <p>Indicates the type of tax district information returned. If you do not want all of the fields in a tax district returned, do not select the check box, and list only those fields you want returned in Extra output fields.</p> <ul style="list-style-type: none"> • Insurance Premium Tax Districts • Payroll Tax Districts • Property Tax Districts • Special Purpose Tax Districts <p>For a description of the fields in each output group, see Output on page 72.</p> |

| Option Name | Description | | | | | | | | | | | |
|-------------------------------|--|--|----------------|---|---------------------------|---|-------------------|--|---------------------|--|----------------|-------------------------------------|
| Sales tax cross-reference key | <p>If you integrate Reverse GeoTAX Info Lookup with third-party tax compliance software from Vertex or Taxware, select which vendor you use. This controls the value returned in the GeoTAXKey output field. One of the following:</p> <table> <tr> <td>Taxware</td><td>Return the Taxware jurisdiction code for the address.</td></tr> <tr> <td>Vertex MatchMaster</td><td>Return the Vertex jurisdiction code for the address. Select this option if you obtained a MatchMaster file from Vertex.</td></tr> <tr> <td>PBS Vertex</td><td>Return the Vertex jurisdiction code for the address. Select this option if you obtained a Vertex file from Pitney Bowes.</td></tr> <tr> <td>None</td><td>Do not return either the Taxware or Vertex jurisdiction codes (default).</td></tr> </table> | | Taxware | Return the Taxware jurisdiction code for the address. | Vertex MatchMaster | Return the Vertex jurisdiction code for the address. Select this option if you obtained a MatchMaster file from Vertex. | PBS Vertex | Return the Vertex jurisdiction code for the address. Select this option if you obtained a Vertex file from Pitney Bowes. | None | Do not return either the Taxware or Vertex jurisdiction codes (default). | | |
| Taxware | Return the Taxware jurisdiction code for the address. | | | | | | | | | | | |
| Vertex MatchMaster | Return the Vertex jurisdiction code for the address. Select this option if you obtained a MatchMaster file from Vertex. | | | | | | | | | | | |
| PBS Vertex | Return the Vertex jurisdiction code for the address. Select this option if you obtained a Vertex file from Pitney Bowes. | | | | | | | | | | | |
| None | Do not return either the Taxware or Vertex jurisdiction codes (default). | | | | | | | | | | | |
| Sales tax rate type | <p>Select the desired Sales tax rate type or None:</p> <table> <tr> <td>None</td><td>Do not return sales tax rates. (default)</td></tr> <tr> <td>General</td><td>Return the General sales tax rates.</td></tr> <tr> <td>Automotive</td><td>Return the Automotive sales tax rates.</td></tr> <tr> <td>Construction</td><td>Return the Construction sales tax rates.</td></tr> <tr> <td>Medical</td><td>Return the Medical sales tax rates.</td></tr> </table> | | None | Do not return sales tax rates. (default) | General | Return the General sales tax rates. | Automotive | Return the Automotive sales tax rates. | Construction | Return the Construction sales tax rates. | Medical | Return the Medical sales tax rates. |
| None | Do not return sales tax rates. (default) | | | | | | | | | | | |
| General | Return the General sales tax rates. | | | | | | | | | | | |
| Automotive | Return the Automotive sales tax rates. | | | | | | | | | | | |
| Construction | Return the Construction sales tax rates. | | | | | | | | | | | |
| Medical | Return the Medical sales tax rates. | | | | | | | | | | | |
| Include extra fields | <p>Indicates the individual output fields you want returned. List fields with a pipe () between each field. You can use this field instead of the Output Record Type to limit the output to those fields that are important to your current data needs.</p> <p>For a list of the fields included in each data type, see Output on page 72.</p> | | | | | | | | | | | |

Output Format

Output format options control how Reverse GeoTAX Info Lookup formats output data. The following table lists the output format options.

Table 27: Reverse GeoTAX Info Lookup Output Format Options

| Option Name | Description | |
|-------------|---|---|
| Casing | Specifies the casing of these output fields: County.Name, MCD.Name, Place.Name, IPDn.DistrictName, PAYn.DistrictName, SPDn.DistrictName, and PTCn.PayrollDescription. | |
| | One of the following: | |
| | Mixed | The output in mixed case (default). For example: Boulder. |
| | Upper | The output in upper case. For example: BOULDER. |

Output

Auxiliary File

The following table lists the output fields that contain auxiliary file data. To include auxiliary file data in the output, select the **Auxiliary** check box under Output Data. The following table lists the output fields that contain tax jurisdiction data.

Table 28: Auxiliary File Output Fields

| Field Name | Max. Field Length (bytes) | Description |
|-----------------------------|---------------------------|---|
| AuxiliaryData.AuxiliaryFile | 301 | Data retrieved as a result of an auxiliary match from the user-defined area of the auxiliary file. |
| AuxiliaryData.StateFile | 201 | Data retrieved as a result of a state match. Data content and format vary depending on the state file used. |

Census

The census output fields contains census information from the U.S. Census, including Minor Civil Divisions (MCDs) and Census County Division (CCD) names and codes. MCDs are the primary political or administrative divisions of a county, representing many kinds of legal entities with a variety of governmental and administrative functions. CCDs are established in states where there are no legally established MCDs. The Census Bureau recognizes MCDs in 28 states and has established CCDs in 21 states. The District of Columbia has no primary divisions, and the city of Washington, DC is considered equivalent to an MCD for data presentation purposes.

Census data also contains the Federal Information Processing Standards (FIPS) codes for each state and county. The FIPS State Code and the FIPS County Code are both used by the Census Bureau to identify these geographic units.

The following table lists the output fields that contain census data. To include census data in the output, select the **Census** check box under Output Data.

Table 29: Census Data Output Fields

| Field Name | Max. Field Length (bytes) | Description |
|-------------|---------------------------|---|
| County.Code | 4 | <p>Three-digit Federal Information Processing Standards (FIPS) county code extracted from the Census.BlockCode.</p> <p>Note: This field is always included in the output regardless of whether or not you choose to include census data in the output.</p> |
| County.Name | 26 | <p>Name of the county.</p> <p>Note: This field is always included in the output regardless of whether or not you choose to include census data in the output.</p> |
| MCD.Code | 6 | Minor Civil Division/Census County Division (MCD/CCD) Code. |
| MCD.Name | 41 | Minor Civil Division/Census County Division (MCD/CCD) name. |

| Field Name | Max. Field Length (bytes) | Description | | | | | | | | |
|----------------------|---|---|----------|------------------------------|----------|---|----------|---|--------------|--------------------|
| MCD.PointStatus | 2 | <p>An address can be compared to a Minor Civil Division (MCD)/county subdivision file (Cousub.txt). This output field returns the result for a comparison between the matched geocode location to the polygon defined by the Cousub.txb file.</p> <p>For more information on buffers, see Buffering on page 14.</p> <p>Note: The buffer distance for Cousub.txb is internally set to zero and cannot be modified.</p> <table> <tr> <td>P</td><td>The point is in the polygon.</td></tr> <tr> <td>I</td><td>The point is in the buffer area inside the polygon.</td></tr> <tr> <td>B</td><td>The point is in the buffer area and outside of the polygon.</td></tr> <tr> <td>blank</td><td>Polygon not found.</td></tr> </table> | P | The point is in the polygon. | I | The point is in the buffer area inside the polygon. | B | The point is in the buffer area and outside of the polygon. | blank | Polygon not found. |
| P | The point is in the polygon. | | | | | | | | | |
| I | The point is in the buffer area inside the polygon. | | | | | | | | | |
| B | The point is in the buffer area and outside of the polygon. | | | | | | | | | |
| blank | Polygon not found. | | | | | | | | | |
| MCD.DistanceToBorder | 10 | Returns the distance in feet between the matched address point to the polygon defined by the Cousub.txb file. | | | | | | | | |
| StateCode | 3 | <p>Two-digit Federal Information Processing Standards (FIPS) state code extracted from the Census.BlockCode.</p> <p>Note: This field is always included in the output regardless of whether or not you choose to include census data in the output.</p> | | | | | | | | |

Input Latitude/Longitude

Reverse GeoTAX Info Lookup always returns the input coordinates as part of the output. The input latitude/longitude fields are returned as input from the data. Reverse GeoTAX Info Lookup does not change these input values.

Table 30: Input Latitude/Longitude Output Fields

| Field Name | Max. Field Length (bytes) | Description |
|----------------|---------------------------|------------------|
| InputLatitude | 12 | Input latitude. |
| InputLongitude | 12 | Input longitude. |

Payroll System Tax Code

The following table lists the output fields that contain Payroll System Tax Code (PTC) data. For more information on payroll tax districts, see [Reverse GeoTAX Info Lookup](#). To include this data in the output, select **Payroll System Tax Codes** in the **Output Record Type** field.

Note: Reverse GeoTAX Info Lookup returns up to six payroll tax codes per input location.

Table 31: Payroll System Tax Code Output Fields

| Field Name | Max. Field Length (bytes) | Description |
|-----------------|---------------------------|--|
| NumberPTCsFound | 2 | The number of payroll system tax codes found for this location. |
| PTCn.MatchCode | 2 per PTC | <p>Indicates the level of match obtained for the location. In order from most specific match to least, the possible match codes are:</p> <ul style="list-style-type: none"> P The address was matched to a specific Payroll District ID. This is the most specific match. G The address was matched to a GNIS Code. F The address was matched to a county's FIPS code. S The address was matched to a state's FIPS code. This is the least specific match. |

| Field Name | Max. Field Length (bytes) | Description |
|-------------------------|---------------------------|--|
| PTCn.PayrollCode | 16 per PTC | A code that represents a taxing authority in a payroll application. This is a user-defined code. The specific codes are determined by the payroll application that utilizes the data returned by Reverse GeoTAX Info Lookup. |
| PTCn.PayrollDescription | 41 per PTC | A description of the purpose of this payroll code. |
| PTCn.PayrollFlag | 7 per PTC | A user-defined flag from the PTC database. |
| StateCounty | 33 | The state abbreviation and county name. |

Tax Jurisdiction

Tax jurisdiction data contains information about the "place" for the location. A "place" is a geographic area defined on the basis of population criteria that vary by state; or, an area recognized as significant because it is located in an incorporated municipality. Places are used to determine tax jurisdiction.

The following table lists the output fields that contain tax jurisdiction data. To include tax jurisdiction data in the output, select the **Tax Jurisdiction** check box under **Output Data**.

Table 32: Tax Jurisdiction Output Fields

| Field Name | Max. Field Length (bytes) | Description |
|------------|---------------------------|--|
| GeoTAXKey | 10 | <p>The value in this field varies depending on the option you specified in the Sales tax cross-reference key option:</p> <p>If you specified Taxware, GeoTAXKey contains the proprietary codes used in Taxware tax compliance software. You can use this code in your Taxware application to find out the tax rate for the jurisdiction.</p> |

| Field Name | Max. Field Length (bytes) | Description |
|----------------------|---------------------------|--|
| | | If you specified Vertex MatchMaster or PBS Vertex, GeoTAXKey contains the proprietary Vertex® jurisdiction code (comprised of a two-digit Vertex® state code, three-digit FIPS county code, and four-digit Vertex® city code). You can use this code in your Vertex® application to find out the tax rate for the jurisdiction. |
| GeoTAXKey.MatchCode | 2 | <p>Return code denoting the level of match obtained against the Vertex or Taxware cross reference files.</p> <ul style="list-style-type: none"> E Exact match using five fields: FIPS state code, FIPS county code, FIPS or GNIS place code, ZIP Code, and FIPS place name. P Partial match using four fields: FIPS state code, FIPS county code, FIPS or GNIS place code, and ZIP Code. A Alternate match using two fields: ZIP Code, FIPS place name. N Record is default coded based on valid state code. null No matching record found. |
| GeoTAXKey.MatchLevel | 12 | <p>A description of the value returned in the GeoTAXKey.MatchCode field.</p> <ul style="list-style-type: none"> Exact Exact match. See description in GeoTAXKey.MatchCode. Partial Partial match. See description in GeoTAXKey.MatchCode. Alternate Alternate match. See description in GeoTAXKey.MatchCode. DefaultCode Record is default coded. See description in GeoTAXKey.MatchCode. NoMatch No matching record found. |
| GNISCode | 10 | <p>Unique nine-digit Geographic Names Information System (GNIS) code.</p> <p>Note: This field is always included in the output regardless of whether or not you choose to include census data in the output.</p> |

| Field Name | Max. Field Length (bytes) | Description | | | | | | |
|------------------------|-------------------------------|--|------------|--------------------------|--------------|----------------------------|----------------|-------------------------------|
| Place.ClassCode | 3 | <p>Place class code. Place class codes are used to determine the proper taxing jurisdictions</p> <p>Note: This field is always included in the output regardless of whether or not you choose to include tax jurisdiction data in the output.</p> | | | | | | |
| Place.Code | 6 | <p>An identifier for a specific place. A "place" is a geographic area defined on the basis of population criteria that vary by state. Or, an area recognized as significant because it is located in an incorporated municipality.</p> <p>Note: This field is always included in the output regardless of whether or not you choose to include tax jurisdiction data in the output.</p> | | | | | | |
| Place.IncorporatedFlag | 8 | <p>Indicates whether the address is located in an incorporated or unincorporated place. A "place" is a geographic area defined on the basis of population criteria that vary by state. Or, an area recognized as significant because it is located in an incorporated municipality.</p> <p>Note: This field is always included in the output regardless of whether or not you choose to include tax jurisdiction data in the output.</p> <table> <tr> <td>Inc</td><td>Incorporated place code.</td></tr> <tr> <td>Uninc</td><td>Unincorporated place code.</td></tr> <tr> <td>Unknown</td><td>Incorporation status unknown.</td></tr> </table> | Inc | Incorporated place code. | Uninc | Unincorporated place code. | Unknown | Incorporation status unknown. |
| Inc | Incorporated place code. | | | | | | | |
| Uninc | Unincorporated place code. | | | | | | | |
| Unknown | Incorporation status unknown. | | | | | | | |
| Place.LastAnnexedDate | 8 | <p>Last annexed date, in the format MM/YYYY, representing the month and year of the most recent boundary change or the most recent available boundary information.</p> <p>Note: This field is always included in the output regardless of whether or not you choose to include tax jurisdiction data in the output.</p> | | | | | | |
| Place.LastUpdatedDate | 8 | <p>Last updated date, in the format MM/YYYY, reflecting the month and year when TomTom updated the database to reflect attribute (name change, FIPS change, etc.) or boundary edits to the Place.</p> | | | | | | |

| Field Name | Max. Field Length (bytes) | Description |
|--|---------------------------|---|
| Note: This field is always included in the output regardless of whether or not you choose to include tax jurisdiction data in the output. | | |
| Place.LastVerifiedDate | 8 | Last verified date, in the format MM/YYYY, representing the month and year that TomTom verified municipality change information. |
| Note: This field is always included in the output regardless of whether or not you choose to include tax jurisdiction data in the output. | | |
| Place.Name | 41 | The name of the "place" for the location. A "place" is a geographic area defined on the basis of population criteria that vary by state. Or, an area recognized as significant because it is located in an incorporated municipality. |
| Note: This field is always included in the output regardless of whether or not you choose to include tax jurisdiction data in the output. | | |
| Place.PointStatus | 2 | Returns the result for a comparison between the matched geocode location to the polygon defined by the Place.txb file. For more information on buffers, see Buffering on page 14. |
| <ul style="list-style-type: none"> P The point is in the polygon. I The point is in the buffer area inside the polygon. B The point is in the buffer area and outside of the polygon. blank Polygon not found. | | |
| Place.DistanceToBorder | 10 | Returns the distance in feet between the matched address point to the polygon defined by the Place.txb file. |

User-Defined Boundary File

The following table lists the output fields that contain data returned from user-defined boundary files. To include this data in the output, select the **User-defined boundary file** check box under **Output Data**.

Note: Reverse GeoTAX Info Lookup can return up to 10 user-defined areas for each input location.

Table 33: Output Fields for User-Defined Boundary Files

| Field Name | Max. Field Length (bytes) | Description |
|---------------------------------------|---------------------------|---|
| NumberUserBoundariesFound | 3 | The number of user-defined polygons found for the address. |
| UserBoundary n .BoundaryDescription | 51 per User Boundary | A description of the polygon. |
| UserBoundary n .BoundaryID | 11 per User Boundary | The ID of the polygon as specified in the user-defined boundary file. |
| UserBoundary n .BufferRelation | 2 per User Boundary | <p>Indicates where in the polygon the location resides in relation to the edge of the area.</p> <p>One of the following:</p> <ul style="list-style-type: none"> P The geocode is inside the polygon at a distance from the edge that is greater than the specified buffer width. Buffer width is specified either by the option Default Buffer Width or by the input field BufferSize. I The geocode is inside the polygon but is close to the edge. This indicates that the address is in the buffer area specified either by the option Default Buffer Width or by the input field BufferSize. B The geocode is outside the polygon but is close to the edge. This indicates that the address is in the buffer area specified either by the option Default Buffer Width or by the input field BufferSize. |

For more information, see [Buffering](#) on page 14.

| Field Name | Max. Field Length (bytes) | Description |
|--|---------------------------|--|
| UserBoundary n .DistanceToBorder | 10 per User Boundary | Indicates the distance in feet from the input location to the border of the polygon. |
| UserBoundary n .SupplementalBoundaryID | 11 per User Boundary | A supplemental ID as specified in the user-defined boundary file. |

Insurance Premium Tax Districts

The following table lists the output fields that contain Insurance Premium Tax Districts (IPD) data. For more information on insurance premium tax districts, see [Reverse GeoTAX Info Lookup](#) on page 67. To include IPD data in the output, select **Insurance Premium Tax District** in the Output Tax District field.

Note: Reverse GeoTAX Info Lookup returns multiple districts for IPDs, SPDs, PTDs, and PAYs.

Table 34: Insurance Premium Tax District Output Fields

| Field Name | Max. Field Length (bytes) | Description |
|--|---------------------------|---|
| NumberIPDsFound | 3 | The number of Insurance Premium Tax Districts found for the location. |
| IPD n .BoundaryBuffer.BufferRelation | 2 per IPD | <p>Indicates where in the district the location resides in relation to the edge of the district.</p> <p>One of the following:</p> <ul style="list-style-type: none"> P The location is inside the district at a distance from the edge that is greater than the specified buffer width. Buffer width is specified either by the option Default Buffer Width or by the input field BufferWidth. I The location is inside the district but is close to the edge. This indicates that the location is in the buffer area specified |

| Field Name | Max. Field Length (bytes) | Description |
|--|---------------------------|---|
| | | <p>either by the option Default Buffer Width or by the input field BufferSize.</p> <p>B The location is outside the district but is close to the edge. This indicates that the location is in the buffer area specified either by the option Default Buffer Width or by the input field BufferSize.</p> <p>For more information, see Buffering on page 14.</p> |
| IPD n .BoundaryBuffer.DistanceToBorder | 10 per IPD | Indicates the distance in feet from the location to the border of the district. |
| IPD n .DistrictID | 11 per IPD | IPD ID. |
| IPD n .DistrictName | 61 per IPD | IPD name. |
| IPD n .DistrictType | 7 per IPD | IPD district type. |
| IPD n .UpdateDate | 7 per IPD | IPD update date (MMYYYY). |
| IPD n .VersionDate | 7 per IPD | IPD compiled date (MMYYYY). |
| IPD n .Notes | 21 per IPD | <p>Tax code descriptions.</p> <p>For example: 01, 33, A, B</p> |
| IPD n .ChangeDate | 7 per IPD | IPD change date. |
| IPD n .EffectiveDate | 7 per IPD | <p>MMDDYY - Identifies when district becomes active - State supplied</p> <p>For example: 010108</p> |
| IPD n .ExpirationDate | 7 per IPD | <p>MMDDYY - Identifies when district becomes inactive - State supplied</p> |

| Field Name | Max. Field Length (bytes) | Description |
|--------------------------------|---------------------------|---|
| For example: 063009 | | |
| IPDn.FireRate | 21 per IPD | Format is dependent on associated flag For example: .13, 15.00 or 3;7 |
| For example: .13, 15.00 or 3;7 | | |
| IPDn.FireFlag | 6 per IPD | P - Percentage; .1 = 10%, .0575 = 5.75% F - Flat Fee dollar amount M - Multiple Percentages has a semi colon as a delimiter. 3;7 = "3% or 7%" |
| For example: .13, 15.00 or 3;7 | | |
| IPDn.CasualtyRate | 21 per IPD | Format is dependent on associated flag For example: .13, 15.00 or 3;7 |
| For example: .13, 15.00 or 3;7 | | |
| IPDn.CasualtyFlag | 6 per IPD | P - Percentage; .1 = 10%, .0575 = 5.75% F - Flat Fee dollar amount M - Multiple Percentages has a semicolon as a delimiter. 3;7 = "3% or 7%" |
| For example: .13, 15.00 or 3;7 | | |
| IPDn.VehicleRate | 21 per IPD | Format is dependent on associated flag For example: .13, 15.00 or 3;7 |
| For example: .13, 15.00 or 3;7 | | |
| IPDn.VehicleFlag | 6 per IPD | P - Percentage; .1 = 10%, .0575 = 5.75% F - Flat Fee dollar amount M - Multiple Percentages has a semicolon as a delimiter. 3;7 = "3% or 7%" |
| For example: .13, 15.00 or 3;7 | | |
| IPDn.MarineRate | 21 per IPD | Format is dependent on associated flag For example: .13, 15.00 or 3;7 |
| For example: .13, 15.00 or 3;7 | | |
| IPDn.MarineFlag | 6 per IPD | P - Percentage; .1 = 10%, .0575 = 5.75% F - Flat Fee dollar amount |

| Field Name | Max. Field Length (bytes) | Description |
|------------------|---------------------------|--|
| | | M - Multiple Percentages has a semicolon as a delimiter. 3;7 = "3% or 7%" |
| IPDn.HealthRate | 21 per IPD | Format is dependent on associated flag For example: .13, 15.00 or 3;7 |
| IPDn.HealthFlag | 6 per IPD | P - Percentage; .1 = 10%, .0575 = 5.75% F - Flat Fee dollar amount M - Multiple Percentages has a semicolon as a delimiter. 3;7 = "3% or 7%" |
| IPDn.LifeRate | 21 per IPD | Format is dependent on associated flag For example: .13, 15.00 or 3;7 |
| IPDn.LifeFlag | 6 per IPD | P - Percentage; .1 = 10%, .0575 = 5.75% F - Flat Fee dollar amount M - Multiple Percentages has a semicolon as a delimiter. 3;7 = "3% or 7%" |
| IPDn.OtherRate | 21 per IPD | Format is dependent on associated flag Possible Values: .13, 15.00 or 3;7 |
| IPDn.OtherFlag | 6 per IPD | P - Percentage; .1 = 10%, .0575 = 5.75% F - Flat Fee dollar amount M - Multiple Percentages has a semicolon as a delimiter. 3;7 = "3% or 7%" |
| IPDn.MinimumRate | 21 per IPD | Format is dependent on associated flag For example: .13, 15.00 or 3;7 |
| IPDn.MinimumFlag | 6 per IPD | P - Percentage; .1 = 10%, .0575 = 5.75% |

| Field Name | Max. Field Length (bytes) | Description |
|------------|---------------------------|---|
| | | F - Flat Fee dollar amount M - Multiple Percentages has a semicolon as a delimiter. 3;7 = "3% or 7%" |

Payroll Tax Districts

The following table lists the output fields that contain Payroll Tax District (PAY) data. For more information on payroll tax districts, see [Reverse GeoTAX Info Lookup](#). To include this data in the output, select **Payroll Tax District** in the **Output Tax District** field.

Note: Reverse GeoTAX Info Lookup returns multiple districts for IPDs, SPDs, PTDs, and PAYs.

Table 35: Payroll Tax District Output Fields

| Field Name | Max. Field Length (bytes) | Description |
|------------------------------------|---------------------------|--|
| NumberPAYsFound | 3 | Number of payroll tax districts found for the location. |
| PAYn.BoundaryBuffer.BufferRelation | 2 per PAY | <p>Indicates where in the district the location resides in relation to the edge of the district.</p> <p>One of the following:</p> <ul style="list-style-type: none"> P The location is inside the district at a distance from the edge that is greater than the specified buffer width. Buffer width is specified either by the option Default Buffer Width or by the input field BufferSize. I The location is inside the district but is close to the edge. This indicates that the location is in the buffer area specified either by the option Default Buffer Width or by the input field BufferSize. B The location is outside the district but is close to the edge. This indicates that the location is in the buffer area specified either by the option Default Buffer Width or by the input field BufferSize. |

| Field Name | Max. Field Length (bytes) | Description | | | | | | | | |
|---|---------------------------|--|---|----------------|---|-----------------------|---|------|---|------|
| For more information, see Buffering on page 14. | | | | | | | | | | |
| PAYn.BoundaryBuffer.DistanceToBorder | 10 per PAY | Indicates the distance in feet from the location to the border of the district. | | | | | | | | |
| PAYn.DistrictID | 11 per PAY | PAY district ID. | | | | | | | | |
| PAYn.DistrictName | 61 per PAY | PAY district name. | | | | | | | | |
| PAYn.DistrictType | 7 per PAY | PAY district type. | | | | | | | | |
| PAYn.ID | 11 per PAY | PAY ID. | | | | | | | | |
| PAYn.MunicipalEMSTax | 2 per PAY | <p>PAY municipality emergency municipal services tax.</p> <p>The values for Pennsylvania are:</p> <table> <tr> <td>Y</td><td>Levies the tax</td></tr> <tr> <td>N</td><td>Does not levy the tax</td></tr> </table> <p>All other states are null.</p> | Y | Levies the tax | N | Does not levy the tax | | | | |
| Y | Levies the tax | | | | | | | | | |
| N | Does not levy the tax | | | | | | | | | |
| PAYn.MunicipalIncomeTax | 2 per PAY | <p>PAY municipality income tax.</p> <p>The values for Pennsylvania are:</p> <table> <tr> <td>R</td><td>Resident</td></tr> <tr> <td>N</td><td>Non-resident</td></tr> <tr> <td>B</td><td>Both</td></tr> <tr> <td>X</td><td>None</td></tr> </table> <p>All other states are null.</p> | R | Resident | N | Non-resident | B | Both | X | None |
| R | Resident | | | | | | | | | |
| N | Non-resident | | | | | | | | | |
| B | Both | | | | | | | | | |
| X | None | | | | | | | | | |
| PAYn.SchoolDistrictEMSTax | 2 per PAY | <p>PAY school district emergency municipal services tax.</p> <p>The Values for Pennsylvania are:</p> | | | | | | | | |

| Field Name | Max. Field Length (bytes) | Description | | | | | | | | | | | | |
|------------------------------|---------------------------|---|----------|----------|----------|--------------|----------|------|----------|---|----------|----------|----------|------|
| | Y | Levies the tax | | | | | | | | | | | | |
| | N | Does not levy the tax | | | | | | | | | | | | |
| | | All other states are null. | | | | | | | | | | | | |
| PAYn.SchoolDistrictIncomeTax | 2 per PAY | <p>PAY school district income tax.</p> <p>The values for Pennsylvania are:</p> <table> <tr> <td>R</td><td>Resident</td></tr> <tr> <td>N</td><td>Non-resident</td></tr> <tr> <td>B</td><td>Both</td></tr> <tr> <td>X</td><td>N</td></tr> </table> <p>The values for Ohio are:</p> <table> <tr> <td>R</td><td>Resident</td></tr> <tr> <td>X</td><td>None</td></tr> </table> <p>All other states are null.</p> | R | Resident | N | Non-resident | B | Both | X | N | R | Resident | X | None |
| R | Resident | | | | | | | | | | | | | |
| N | Non-resident | | | | | | | | | | | | | |
| B | Both | | | | | | | | | | | | | |
| X | N | | | | | | | | | | | | | |
| R | Resident | | | | | | | | | | | | | |
| X | None | | | | | | | | | | | | | |

Property Tax District

The following table lists the output fields that contain Property Tax District (PTD) data. For more information on property tax districts, see [Reverse GeoTAX Info Lookup](#) on page 67. To include this data in the output, select the **Property Tax District** check box in the **Output Tax District** field.

Note: Reverse GeoTAX Info Lookup returns multiple districts for IPDs, SPDs, PTDs, and PAYs.

Table 36: Property Tax District Output Fields

| Field Name | Max. Field Length (bytes) | Description |
|-----------------|---------------------------|--|
| NumberPTDsFound | 3 | The number of Property Tax Districts found for the location. |

| Field Name | Max. Field Length (bytes) | Description |
|--------------------------------------|---------------------------|---|
| PTDn.BoundaryBuffer.BufferRelation | 2 per PTD | <p>Indicates where in the district the location resides in relation to the edge of the district.</p> <p>One of the following:</p> <ul style="list-style-type: none"> P The location is inside the district at a distance from the edge that is greater than the specified buffer width. Buffer width is specified either by the option Default Buffer Width or by the input field BufferSize. I The location is inside the district but is close to the edge. This indicates that the location is in the buffer area specified either by the option Default Buffer Width or by the input field BufferSize. B The location is outside the district but is close to the edge. This indicates that the address is in the buffer area specified either by the option Default Buffer Width or by the input field BufferSize. |
| | | For more information, see Buffering on page 14. |
| PTDn.BoundaryBuffer.DistanceToBorder | 10 per PTD | Indicates the distance in feet from the location to the border of the district. |
| PTDn.DistrictID | 11 per PTD | PTD district ID. |
| PTDn.DistrictName | 61 per PTD | PTD district name. |
| PTDn.DistrictType | 2 per PTD | <p>PTD district type. Only returned for Indiana.</p> <ul style="list-style-type: none"> R Reporting district B Billing district |
| PTDn.JurisdictionID | 11 per PTD | PTD jurisdiction ID. |
| PTDn.UpdateDate | 7 per PTD | PTD update date. |

Special Purpose Tax Districts

The following table lists the output fields that contain Special Purpose Tax Districts (SPD) data. For more information on special purpose tax districts, see [Reverse GeoTAX Info Lookup](#). To include this data in the output, select **Special Purpose Tax District** in the **Output Tax District** field.

Note: Reverse GeoTAX Info Lookup returns multiple districts for IPDs, SPDs, PTDs, and PAYs.

Table 37: Special Purpose Tax District Output Fields

| Field Name | Max. Field Length (bytes) | Description |
|--------------------------------------|---------------------------|---|
| NumberSPDsFound | 3 | Number of Special Purpose Tax Districts found for the location. |
| SPDn.BoundaryBuffer.BufferRelation | 2 per SPD | <p>Indicates where in the district the location resides in relation to the edge of the district.</p> <p>One of the following:</p> <ul style="list-style-type: none"> P The location is inside the district at a distance from the edge that is greater than the specified buffer width. Buffer width is specified either by the option Default Buffer Width or by the input field BufferSize. I The location is inside the district but is close to the edge. This indicates that the location is in the buffer area specified either by the option Default Buffer Width or by the input field BufferSize. B The location is outside the district but is close to the edge. This indicates that the location is in the buffer area specified either by the option Default Buffer Width or by the input field BufferSize. <p>For more information, see Buffering on page 14.</p> |
| SPDn.BoundaryBuffer.DistanceToBorder | 10 per SPD | Indicates the distance in feet from the address to the border of the district. |
| SPDn.CompiledDate | 7 per SPD | SPD compiled date. |

| Field Name | Max. Field Length (bytes) | Description |
|---------------------|---------------------------|-----------------------------|
| SPDn.DistrictCode | 4 per SPD | 3-digit district type code. |
| SPDn.DistrictName | 61 per SPD | SPD name. |
| SPDn.DistrictNumber | 6 per SPD | SPD district number. |
| SPDn.EffectiveDate | 7 per SPD | SPD effective date. |
| SPDn.UpdateDate | 7 per SPD | SPD update date. |
| SPDn.VersionDate | 7 per SPD | SPD version date. |

Sales and Use Tax Rates

The following table lists the output fields that contain the sales and use tax rate data.

To include this data in the output, use the **Sales tax rate type** dropdown menu to select one of the following:

- General,
- Automotive,
- Construction, or
- Medical

Table 38: Sales and Use Tax Rate Output Fields

| Field Name | Max. Field Length (bytes) | Description |
|------------------------|---------------------------|--|
| TaxRate.RC | 2 | <p>Tax Rate return code denoting the level of match obtained against the Pitney Bowes Software Sales and Use Tax Rate file:</p> <ul style="list-style-type: none"> E Exact match, using all 5 fields P Partial match, using 4 fields A Alternate match, using 3 fields N Record is default-coded based on valid state code. Blank No matching PB Software Sales and Use Tax Rate record found. |
| Municipal.SalesTaxRate | 11 | Municipality sales tax rate for the selected tax rate type. |
| County.SalesTaxRate | 11 | County sales tax rate for the selected tax rate type. |
| State.SalesTaxRate | 11 | State sales tax rate for the selected tax rate type. |
| SPDn.SalesTaxRate | 11 per SPD | Sales tax rate for up to 10 Special Purpose Districts (SPD). |
| TaxRate.SalesTotal | 11 | The sum of the individual Municipal, County, State and SPD sales tax rates. |
| Municipal.UseTaxRate | 11 | Municipality use tax rate for the selected tax rate type. |
| County.UseTaxRate | 11 | County use tax rate for the selected tax rate type. |
| State.UseTaxRate | 11 | State use tax rate for the selected tax rate type. |
| SPDn.UseTaxRate | 11 per SPD | Use tax rate for up to 10 Special Purpose Districts (SPD). |

| Field Name | Max. Field Length (bytes) | Description |
|------------------|---------------------------|---|
| TaxRate.UseTotal | 11 | The sum of the individual Municipal, County, State and SPD use tax rates. |

Error Reporting

The following table defines the error reporting output fields.

Table 39: Error Output Fields

| Field Name | Max. Field Length (bytes) | Description | | | | | | | | | | | | | | | | | | | | | | | | |
|---------------|--|--|--------------|-----------------------------|----------|-----------------------------|-----------|--------------------------|-----------|---------------------------|----------|---------------|----------|------------------------------------|----------|---------------------------------|----------|-------------------|----------|--------------------|----------|-------------------------------|----------|--|----------|----------------------|
| GTX.ErrorCode | 3 | <p>This field contains a return code if the GeoTAX engine experiences an abnormal termination.</p> <p>Note: This field contains the same set of codes returned by the standalone GeoTAX software and is intended for users who have migrated from GeoTAX to Spectrum™ Technology Platform.</p> <p>The first character indicates the file (or set of files affected).</p> <table> <tbody> <tr> <td>Blank</td> <td>Matcher terminated normally</td> </tr> <tr> <td>A</td> <td>User Auxiliary file problem</td> </tr> <tr> <td>CE</td> <td>coubsub.txb file problem</td> </tr> <tr> <td>CI</td> <td>Confidence engine problem</td> </tr> <tr> <td>D</td> <td>Boundary file</td> </tr> <tr> <td>F</td> <td>User-defined boundary file problem</td> </tr> <tr> <td>G</td> <td>Address Matching engine problem</td> </tr> <tr> <td>L</td> <td>Licensing problem</td> </tr> <tr> <td>S</td> <td>State file problem</td> </tr> <tr> <td>U</td> <td>GeoTAX Auxiliary file problem</td> </tr> <tr> <td>X</td> <td>Combination of Street and state file problem</td> </tr> <tr> <td>Z</td> <td>zip.gsb file problem</td> </tr> </tbody> </table> | Blank | Matcher terminated normally | A | User Auxiliary file problem | CE | coubsub.txb file problem | CI | Confidence engine problem | D | Boundary file | F | User-defined boundary file problem | G | Address Matching engine problem | L | Licensing problem | S | State file problem | U | GeoTAX Auxiliary file problem | X | Combination of Street and state file problem | Z | zip.gsb file problem |
| Blank | Matcher terminated normally | | | | | | | | | | | | | | | | | | | | | | | | | |
| A | User Auxiliary file problem | | | | | | | | | | | | | | | | | | | | | | | | | |
| CE | coubsub.txb file problem | | | | | | | | | | | | | | | | | | | | | | | | | |
| CI | Confidence engine problem | | | | | | | | | | | | | | | | | | | | | | | | | |
| D | Boundary file | | | | | | | | | | | | | | | | | | | | | | | | | |
| F | User-defined boundary file problem | | | | | | | | | | | | | | | | | | | | | | | | | |
| G | Address Matching engine problem | | | | | | | | | | | | | | | | | | | | | | | | | |
| L | Licensing problem | | | | | | | | | | | | | | | | | | | | | | | | | |
| S | State file problem | | | | | | | | | | | | | | | | | | | | | | | | | |
| U | GeoTAX Auxiliary file problem | | | | | | | | | | | | | | | | | | | | | | | | | |
| X | Combination of Street and state file problem | | | | | | | | | | | | | | | | | | | | | | | | | |
| Z | zip.gsb file problem | | | | | | | | | | | | | | | | | | | | | | | | | |

| Field Name | Max. Field Length (bytes) | Description |
|----------------------|---------------------------|---|
| | | <p>The second position is one of the following:</p> <ul style="list-style-type: none"> E Fatal issue, program terminating F Expired database I Informational |
| GTX.ErrorDescription | 81 | <p>If the GeoTAX engine experiences an abnormal termination, this field contains a text description of the reason. It is blank if GeoTAX terminated normally. The maximum length is 80.</p> <p>Note: This field contains the same set of descriptions returned by the standalone GeoTAX software and is intended for users who have migrated from GeoTAX to Spectrum™ Technology Platform.</p> <p>SI-"TS158 FILES NOT FOUND" SI-"TS158 FILES VINTAGE OR INCOMPLETE DB ERROR" SI-"STATE FILES NOT FOUND" SE-"STATE AND TS158 FILES NOT FOUND" SE-"STATE NOT FOUND AND TS158 VINTAGE ERROR" SI-"STATE FILES VINTAGE OR INCOMPLETE DB ERROR" SE-"STATE VINTAGE ERROR AND TS158 NOT FOUND" SE-"STATE AND TS158 FILES VINTAGE OR INCOMPLETE DB ERROR" GI-"STREET FILES NOT FOUND" XI-"STREET AND TS158 FILES NOT FOUND" XI-"STREET NOT FOUND AND TS158 FILES VINTAGE ERROR" XI-"STREET AND STATE FILES NOT FOUND" XE-"STREET STATE AND TS158 FILES NOT FOUND" XE-"STREET AND STATE NOT FOUND AND TS158 VINTAGE ERROR" XI-"STREET NOT FOUND AND STATE VINTAGE ERROR" XE-"STREET AND TS158 NOT FOUND AND STATE VINTAGE ERROR" XE-"STREET NOT FOUND AND STATE AND TS158 VINTAGE ERROR" GI-"STREET FILES VINTAGE OR INCOMPLETE DB ERROR" XI-"STREET VINTAGE ERROR AND TS158 NOT FOUND" XI-"STREET AND TS158 FILES VINTAGE OR INCOMPLETE DB ERROR" XI-"STREET VINTAGE ERROR AND STATE NOT FOUND" XE-"STREET VINTAGE ERROR AND STATE AND TS158 NOT FOUND" XE-"STREET AND TS158 VINTAGE ERROR AND STATE NOT FOUND"</p> |

| Field Name | Max. Field Length (bytes) | Description |
|---------------------|---------------------------|---|
| | | XI-"STREET AND STATE FILES VINTAGE OR INCOMPLETE DB ERROR" XE-"STREET AND STATE VINTAGE ERROR AND TS158 NOT FOUND" XE-"STREET STATE AND TS158 VINTAGE ERROR" LF-"INVALID FUNCTION PASSED TO GTDBLIO : " AI-"GENIO ERROR: FILE = G1GTaux , FUNC = , ST = " UI-"GENIO ERROR: FILE = G1GTax2 , FUNC = , ST = " XF-"The (DB Vintage) database has expired!" XF-"The (SPD file Vintage) SPD File has expired!" DI- "UNABLE TO VALIDATE BOUNDARY LICENSE" DI- "UNABLE TO OPEN BOUNDARY FILE" DI- "BOUNDARY FILE NOT FOUND" FI- "UNABLE TO VALIDATE USER BOUNDARY LICENSE" FI- "UNABLE TO OPEN USER BND FILE" FI- "USER BND FILE NOT FOUND" |
| GTX.WarnCode | 3 | <p>This field contains warning codes returned by the GeoTAX engine. It is blank if no warnings were issued. A value of WN indicates a database will expire next month.</p> <p>Note: This field contains the same set of codes returned by the standalone GeoTAX software and is intended for users who have migrated from GeoTAX to Spectrum™ Technology Platform.</p> |
| GTX.WarnDescription | 81 | <p>A text description of any warnings returned by the GeoTAX engine.</p> <p>Note: This field contains the same set of descriptions returned by the standalone GeoTAX software and is intended for users who have migrated from GeoTAX to Spectrum™ Technology Platform.</p> |

5 - Reports

In this section

| | |
|-----------------|----|
| Summary Reports | 96 |
|-----------------|----|

Summary Reports

Assign GeoTAX Info Summary Report

A pre-configured report can be generated for a job. This is supported for a job run through either the Assign GeoTAX Info or the Reverse GeoTAX Info Lookup stage. The report summarizes general information about the job, such as the settings, number of records processed, performance statistics, and the database used. It also contains detailed statistics about the results of the job.

The summary report contains the following sections for Assign GeoTAX Info and Reverse GeoTAX Info Lookup except where noted.

Job Summary

This section contains information about the software and databases used for the job.

- **Software Version**—The version of the underlying software used by Assign GeoTAX Info. Note that this is not the same as the Spectrum™ Technology Platform version number.
- **Input Mode**—The type of input data.
 - Address Input—Indicates the data was generated from a job using the Assign GeoTAX Info stage.
 - Latitude-Longitude Input—Indicates the data was generated from a job using the Reverse GeoTAX Info Lookup stage.
- **Street Database Vendor**—The street database vendor used for matching.
- **Street Database Version**—The version of the Street portion of the Master File database. For information on the Master File, see [Enterprise Tax Module](#) on page 4.
- **Cross Reference Database Version**—The version of the cross-reference database used in this job. Cross-reference databases are used to determine jurisdiction codes for use with third-party tax software. For information on the Cross Reference databases, see [Enterprise Tax Module](#) on page 4.

Address Matching Summary

Note: This section of the summary is not provided for jobs using the Reverse GeoTAX Info Lookup stage.

This section describes the input address match counts.

- **Total Match Attempts**—Address matches attempted in this job.
- **Total Records Matched**—Input addresses that were matched to known locations.

- **Total Unmatched Records**—Input addresses that could not be matched to known addresses.

Address Matching Levels

Note: This section of the summary is not provided for jobs using the Reverse GeoTAX Info Lookup stage.

This section lists the counts and percentages of the types of address matches performed by Assign GeoTAX Info.

- **User-Defined Auxiliary File Matches**—The number of address matches made to the user-defined auxiliary file. For information on a user-defined auxiliary file, see [Enterprise Tax Module](#) on page 4.
- **GeoTAX Auxiliary File Matches**—The number of address matches made to the GeoTAX Auxiliary file. For information on the GeoTAX Auxiliary file, see [Enterprise Tax Module](#) on page 4.
- **State File Matches**—The number of address matches made to a state-supplied files.
- **Landmark Auxiliary Matches**—The number of address matches made to the Landmark Auxiliary file.
- **Point-Level Matches**—The number of address matches made using point-level data.
- **Address-Level Matches**—The number of addresses matches made to an approximate location on a street segment.
- **Street Intersection-Level Matches**—The number of address matches made to a street intersection.
- **Street-Centroid Level Matches**—The number of address matches that were made along the matched street segment.
- **ZIP + 4-Level Matches**—The number of address matches made to an area defined by a ZIP + 4 Code.
- **ZIP-Level Matches**—The number of address matches made to an area defined by a 5-digit ZIP Code.
- **Fallback Geographic Matches**—The number of address matches that were made to a city or state centroid.

Latitude/Longitude Matching

Note: This section of the summary is not provided for jobs using the Reverse GeoTAX Info Lookup stage.

This section lists the counts and percentages of the types of geocodes determined by Assign GeoTAX Info. This section describes how precisely Assign GeoTAX Info determined latitude/longitude coordinates of an address. These counts are based on match codes. For more information, on match codes, see [Latitude/Longitude](#) on page 34.

- **Total Lat/Long Matches**—Addresses that Assign GeoTAX Info determined latitude/longitude coordinates. Addresses included in this count have any value other than null in the **LatLong.MatchCode** output field.

- **Total Lat/Long Unmatched**—Addresses that Assign GeoTAX Info was unable to determine latitude/longitude. Addresses included in this count have a value of null in the **LatLong.MatchCode** output field.
- **GeoTAX Auxiliary-level Matches**—The count of geocodes determined using the GeoTAX Auxiliary File.
- **Landmark-Level Matches**—The count of geocodes determined using the Landmark Auxiliary File.
- **Point-level Matches**—The count of geocodes that represent the actual location of the address using point-level data. This is the most accurate type of geocode.
- **Address-Level Matches**—The count of geocodes made to the actual location of the address. Addresses included in this count have a value of R in the **LatLong.MatchCode** output field.
- **ZIP + 4-Level Matches**—The count of geocodes made that represent the center of the ZIP + 4 code in which the address is located. Addresses included in this count have a value of 4 in the **LatLong.MatchCode** output field.
- **Census Block Group-Level Matches**—The count of geocodes that represent the center of the address's Census block group. Addresses included in this count have a value of B in the **LatLong.MatchCode** output field.
- **ZIP + 2-Level Matches**—The count of geocodes that represent the center of the address's ZIP + 2 code. Addresses included in this count have a value of 2 in the **LatLong.MatchCode** output field.
- **Census Tract-Level Matches**—The count of geocodes that represent the center of the address's Census tract. Addresses included in this count have a value of T in the **LatLong.MatchCode** output field.
- **ZIP Code-Level Matches**—The count of geocodes that represent the center of the ZIP Code in which the address is located. Addresses included in this count have a value of Z or 5 in the **LatLong.MatchCode** output field.
- **City-Centroid Level Matches**—The count of geocodes that represent the center of a city.
- **State-Centroid Level Matches**—The count of geocodes that represent the center of a state.

Census Matching

This section describes how precisely Assign GeoTAX Info determined an address location within the statistical areas defined by the U.S. Census.

- **Census Tracts Determined**—Addresses that Assign GeoTAX Info determined a census tract. Addresses included in this count have a value in the **Census.Ttract** output field.
- **Census Tracts Not Determined**—Addresses that Assign GeoTAX Info was unable to determine a census tract. Addresses included in this count have no value in the **Census.Ttract** output field.
- **State Codes Determined**—Addresses that Assign GeoTAX Info determined a state. Addresses included in this count have a value in the **StateCode** output field.
- **State Codes Not Determined**—Addresses that Assign GeoTAX Info did not determine a state. Addresses included in this count have no value in the **StateCode** output field.
- **County Codes Determined**—Addresses that Assign GeoTAX Info determined a county. Addresses included in this count have a value in the **County.Code** output field.

- **County Codes Not Determined**—Addresses that Assign GeoTAX Info did not determine a county. Addresses included in this count have no value in the **County.Code** output field.
- **Census Block Group Determined**—Addresses that Assign GeoTAX Info determined a block group. Addresses included in this count have a value in the **Census.BlockCode** output field.
- **Census Block Groups Not Determined**—Addresses that Assign GeoTAX Info was unable to determine a block group. Addresses included in this count have no value in the **Census.BlockCode** output field.
- **CBSA Codes Determined**—Addresses that Assign GeoTAX Info determined a core based statistical area (CBSA). Addresses included in this count have a value in the **CBSA.Code** output field.
- **CBSA Codes Not Determined**—Addresses that Assign GeoTAX Info did not determine a core based statistical area (CBSA). Addresses included in this count have no value in the **CBSA.Code** output field.
- **MCD/CCD Codes Determined**—Addresses that Assign GeoTAX Info determined a Minor Civil Division/Census County Division code. Addresses included in this count have a value in the **MCD.Code** output field.
- **MCD/CCD Codes Not Determined**—Addresses that Assign GeoTAX Info was unable to determine a Minor Civil Division/Census County Division code. Addresses included in this count have no value in the **MCD.Code** output field.

Tax Jurisdiction Matching

This section describes how accurately Assign GeoTAX Info determined an address place. The place information is used to determine tax jurisdictions.

- **Place Codes Determined**—Addresses that Assign GeoTAX Info determined a place code. Addresses included in this count have a value in the **Place.Code** output field.
- **Place Codes Not Determined**—Addresses that Assign GeoTAX Info was unable to determine a place code. Addresses included in this count have no value in the **Place.Code** output field.
- **Place Names Determined**—Addresses that Assign GeoTAX Info determined a place name. Addresses included in this count have a value in the **Place.Name** output field.
- **Place Class Codes Determined**—Addresses that Assign GeoTAX Info determined a place code. Addresses included in this count have a value in the **Place.ClassCode** output field.
 - **Incorporated Places**—Addresses that reside in an incorporated municipality. Addresses included in this count have a value of Inc in the **Place.IncorporatedFlag** output field.
 - **Unincorporated Places**—Addresses that reside in a place that is not an incorporated municipality. Addresses included in this count have a value of Uninc in the **Place.IncorporatedFlag** output field.
- **Place Last Annexed Date Found**—Places that Assign GeoTAX Info determined the last date of annexation. Addresses included in this count have a value in the **Place.LastAnnexedDate** output field.
- **Place Last Verified Date Found**—Places that Assign GeoTAX Info determined the last date that the place data was verified by the data provider. Addresses included in this count have a value in the **Place.LastVerifiedDate** output field.

- **Place Last Updated Date Found**—Places that Assign GeoTAX Info determined the date that the place data was last updated by the data provider. Addresses included in this count have a value in the **Place.LastUpdatedDate** output field.

GeoTAX Key Matching

This section describes how accurately Assign GeoTAX Info determined GeoTAX keys. A GeoTAX key is used in conjunction with software from a third party to determine tax rates. If you do not choose to return a GeoTAX key, this section is blank.

- **GeoTAX Cross Reference Match Attempts**—Addresses that Assign GeoTAX Info attempted to match to an cross reference file. These files are used to determine codes for use with third party tax software.
- **Unsuccessful GeoTAX Cross Reference Matches**—Addresses that Assign GeoTAX Info attempted to determine a code but was unable.
- **Successful GeoTAX Cross Reference Matches**—Addresses that Assign GeoTAX Info determined a code using a cross reference file. Addresses included in this count have a value in the **GeoTAXKey** output field.
 - **Exact Matches Achieved**—Addresses matched exactly to a GeoTAX key. For more information about GeoTAX key match levels, see the description of the **GeoTAXKey.MatchCode** output field under [Tax Jurisdiction](#) on page 39.
 - **Partial Matches Achieved**—Addresses partially matched to a GeoTAX key. For more information about GeoTAX key match levels, see the description of the **GeoTAXKey.MatchCode** output field under [Tax Jurisdiction](#) on page 39.
 - **Alternate Matches Achieved**—Addresses matched to a GeoTAX key using an alternate, less accurate, method. For more information about GeoTAX key match levels, see the description of the **GeoTAXKey.MatchCode** output field under [Tax Jurisdiction](#) on page 39.
 - **Default Matches Achieved**—Addresses matched to a GeoTAX key only at the state level. For more information about GeoTAX key match levels, see the description of the **GeoTAXKey.MatchCode** output field under [Tax Jurisdiction](#) on page 39.

Tax District Matching

This section describes the number of matches to specific types of tax districts. The specific type of tax districts displayed in this section vary based the district type selected in the **Tax district** field.

Note: If you specify a buffer width in the **Tax district buffer** field, a single location could be counted in more than one district due to buffering. For more information about buffering, see [Buffering](#) on page 14.

- **Successful Payroll Tax File Matches**—Addresses that Assign GeoTAX Info determined a payroll tax code using the Payroll Tax District boundary file. For more information on Payroll Tax Districts, see [Payroll Tax District](#) on page 49.
- **Unsuccessful Payroll Tax File Matches**—Addresses that Assign GeoTAX Info was unable to determine a payroll tax code using the Payroll Tax District boundary file. For more information on Payroll Tax Districts, see [Payroll Tax District](#) on page 49.

- **Locations in Special Purpose Districts**—Addresses that reside in at least one Special Purpose District. For more information on Special Purpose Districts, see [Special Purpose Tax District](#) on page 53.
- **Locations in 1 Special Purpose District**—Addresses that reside in a single Special Purpose District. Addresses included in this count have a value of 1 in the **NumberSPDsFound** output field.
- **Locations in 2 Special Purpose Districts**—Addresses that reside in two overlapping Special Purpose Districts. Addresses included in this count have a value of 2 in the **NumberSPDsFound** output field.
- **Locations in 3 or 4 Special Purpose Districts**—Addresses that reside in three or four overlapping Special Purpose Districts. Addresses included in this count have a value of 3 or 4 in the **NumberSPDsFound** output field.
- **Locations in 5+ Special Purpose Districts**—Addresses that reside in five or more overlapping Special Purpose Districts. Addresses included in this count have a value of 5 or greater in the **NumberSPDsFound** output field.
- **Locations in User-Defined Districts**—Addresses that reside in at least one user-defined district. For more information on user-defined districts, see [User-Defined Boundary File](#) on page 43.
- **Locations in 1 User District**—Addresses that reside in one user-defined district. Addresses included in this count have a value of 1 in the **NumberUserBoundariesFound** output field.
- **Locations in 2 User Districts**—Addresses that reside in two overlapping user-defined districts. Addresses included in this count have a value of 2 in the **NumberUserBoundariesFound** output field.
- **Locations in 3+ User Districts**—Addresses that reside in three or more overlapping user-defined districts. Addresses included in this count have a value of 3 in the **NumberUserBoundariesFound** output field.

Generating a Summary Report

The following procedure describes how to add a report to a job.

1. In Enterprise Designer, on the bottom left side of the window under Palette, click **Reports**. A list of available reports appears.
2. Drag the Assign GeoTAX Info icon onto the canvas. You do not need to connect the icon to anything.
3. Double-click the report.
4. Select the stages that you want to contribute to the report.
5. If you want an output format other than PDF, such as html or txt, perform the following steps:
 - a) Click the **Parameters** tab.
 - b) Clear the **Use default reporting options** check box and select the desired output format.
6. Click **OK**. On the toolbar, click the **Run Current Flow** (arrow) button. The **Execution Details** window displays.

7. When the Status field shows succeeded, under Reports, click **AssignGeoTAXInfo**. The Summary Report displays.

Appendix

In this section

| | |
|---------------------------------|-----|
| Match and Location Codes | 104 |
| Payroll Tax Correspondence File | 119 |
| User-Defined Data Files | 125 |
| Type Codes | 136 |
| Class Codes | 142 |

A - Match and Location Codes

In this section

| | |
|-------------------|-----|
| Match Codes | 105 |
| Match Error Codes | 107 |
| Location Codes | 109 |

Match Codes

The following table lists the Match Codes. The Match Codes indicate the portions of the address that matched or did not match to the reference file. If a match could not be made, the Match Code begins with E and the remaining digits indicate why the address did not match. The digits do not specifically refer to which address elements did not match, but rather why the address did not match. These fields are always included in the output from Assign GeoTAX Info.

Table 40: Match Codes

| Code | Description |
|------|--|
| Ahh | Same as Shh, but indicates match to an alias name record or an alternate record. |
| Chh | Street address did not match, but located a street segment based on the input ZIP Code or city. |
| D00 | Matched to a small town with P.O. Box or General Delivery only. |
| Ghh | Matched to an auxiliary file. |
| Hhh | House number was changed. |
| Qhh | Matched to USPS range records with unique ZIP Codes. CASS rules prohibit altering an input ZIP if it matches a unique ZIP Code value. |
| Rhh | Matched to a ranged address. |
| Shh | Matched to USPS data. This is considered the best address match, because it matched directly against the USPS list of addresses. S is returned for a small number of addresses when the matched address has a blank ZIP + 4. |
| Thh | Matched to a street segment record. Street segment records do not contain ZIP Code information. If you enter a ZIP Code, the application returns the ZIP Code you entered. If the input city and state has only one ZIP Code, the application returns that ZIP Code. |
| Uhh | Matched to USPS data but cannot resolve the ZIP + 4 code without the firm name or other information. |

| Code | Description |
|------|---|
| Xhhh | Matched to an intersection of two streets, for example, "Clay St & Michigan Ave." The first hex digit refers to the last line information, the second hex digit refers to the first street in the intersection, and the third hex digit refers to the second street in the intersection. Note: The USPS does not allow intersections as a valid deliverable address |
| Yhhh | Same as Xhhh, but an alias name record was used for one or both streets. |
| Z | No address given, but verified the provided ZIP Code. |

Hex digit decoding

The following table contains the description of the hex digits for the Match Code values.

| Code | In first hex position means: | In second and third hex position means: |
|------|------------------------------------|--|
| 0 | No change in last line. | No change in address line. |
| 1 | ZIP Code changed. | Street type changed. |
| 2 | City changed. | Pre-directional changed. |
| 3 | City and ZIP Code changed. | Street type and pre-directional changed. |
| 4 | State changed. | Post-directional changed. |
| 5 | State and ZIP Code changed. | Street type and post-directional changed. |
| 6 | State and City changed. | Pre-directional and post-directional changed. |
| 7 | State, City, and ZIP Code changed. | Street type, pre-directional, and postdirectional changed. |
| 8 | ZIP + 4 changed. | Street name changed. |
| 9 | ZIP and ZIP + 4 changed. | Street name and street type changed. |

| Code | In first hex position means: | In second and third hex position means: |
|------|--|--|
| A | City and ZIP + 4 changed. | Street name and pre-directional changed. |
| B | City, ZIP, and ZIP + 4 changed. | Street name, street type, and pre-directional changed. |
| C | State and ZIP + 4 changed. | Street name and post-directional changed. |
| D | State, ZIP, and ZIP + 4 changed. | Street name, street type, and post-directional changed. |
| E | State, City, and ZIP + 4 changed. | Street name, pre-directional, and postdirectional changed. |
| F | State, City, ZIP, and ZIP + 4 changed. | Street name, street type, pre-directional, and post-directional changed. |

Match Error Codes

The following table describes the values returned when an error occurs or the application cannot find a match.

Table 41: Result Indicator Match Error Codes

| Code | Description |
|-------------------|--|
| Ennn, where nnn = | Indicates an error, or no match. This can occur when the address entered does not exist in the database, or the address is badly formed and cannot be parsed correctly. The last three digits of an error code indicate which parts of an address the application could not match to the database. |
| 000 | No match made. |
| 001 | Low level error. |
| 002 | Could not find data file. |
| 003 | Incorrect GSD file signature or version ID. |

| Code | Description |
|------|---|
| 010 | No city and state or ZIP Code found. |
| 011 | Input ZIP not in the directory. |
| 012 | Input city not in the directory. |
| 013 | Input city not unique in the directory. |
| 014 | Out of licensed area. Only occurs if using Group 1 licensing technology. |
| 015 | Record count is depleted and license has expired. |
| 020 | No matching streets found in directory. |
| 021 | No matching cross streets for an intersection match. |
| 022 | No matching segments. |
| 023 | Unresolved match. |
| 024 | No matching segments. (Same as 022.) |
| 025 | Too many possible cross streets for intersection matching. |
| 026 | No address found when attempting a multiline match. |
| 027 | Invalid directional attempted. |
| 028 | Record also matched EWS data, therefore the application denied the match. |
| 029 | No matching range, single street segment found. |
| 030 | No matching range, multiple street segments found. |

Location Codes

The Location Codes indicate the methodology used to compute the geocode and may also provide some information about the quality of the geocode.

A Location Code of 'E' indicates a location code is not available. This usually occurs when you have requested ZIP Code centroids of a high quality, and one is not available for that match. It can occur infrequently when the Enterprise Tax Module does not have a 5-digit centroid location. An 'E' location code type may also be returned when the input address cannot be standardized and there is no input ZIP Code. In this case, do not assume the ZIP Code returned with the nonstandardized address is the correct ZIP Code because the Enterprise Tax Module did not standardize the address; therefore, the Enterprise Tax Module does not return geocoding or Census Block information.

Address Location Codes

Address location codes detail the known qualities about the geocode. An address location code has the following characters.

| Characters | Description | |
|---------------|---|--|
| 1st character | Always an 'A' indicating an address location. | |
| 2nd character | May be one of the following: | |
| | C | Interpolated address point location. |
| | G | GeoTAX Auxiliary file or Landmark Auxiliary file data location. |
| | I | Application infers the correct segment from the candidate records. |
| | P | Point-level data location. |
| | R | Location represents a ranged address. |
| | S | Location on a street range. |
| | X | Location on an intersection of two streets. |

| Characters | Description |
|------------------------|--|
| 3rd and 4th characters | Digit indicating other qualities about the location. |

Table 42: Location Codes

| Code | Description |
|--|---|
| ACn - Interpolated address point location | |
| AIn - The correct segment is inferred from the candidate records at match time. | |
| ASn - House range address geocode. This is the most accurate street interpolated geocode available. | |
| where n = | |
| 0 | Best location. |
| 1 | Street side is unknown. The Census FIPS Block ID is assigned from the left side; however, there is no assigned offset and the point is placed directly on the street. |
| 2 | Indicates one or both of the following: <ul style="list-style-type: none"> The address is interpolated onto a TIGER segment that did not initially contain address ranges. The original segment name changed to match the USPS spelling. This specifically refers to street type, predirectional, and postdirectional. <p>Note: Only the second case is valid for non-TIGER data because segment range interpolation is only completed for TIGER data.</p> |
| 3 | Both 1 and 2. |
| 7 | Placeholder. Used when starting and ending points of segments contain the same value and shape data is not available. |
| AGn - Indicates a geocode match to a GeoTAX Auxiliary or Landmark Auxiliary file, | |
| where n = | |
| 0 | The geocode represents the center of a parcel or building. |
| 1 | The geocode is an interpolated address along a segment. |

Code

Description

2

The geocode is an interpolated address along a segment, and the side of the street cannot be determined from the data provided in the auxiliary file record.

3

The geocode is the midpoint of the street segment.

APnn - Indicates a point-level geocode match representing the center of a parcel or building,

where nn =

02

Parcel centroid

Indicates the center of an assessor's parcel (tract or lot) polygon. When the center of an irregularly shaped parcel falls outside of its polygon, the centroid is manually repositioned to fall inside the polygon as closely as possible to the actual center.

04

Address point

Represents field-collected GPS points with field-collected address data.

05

Structure centroid

Indicates the center of a building footprint polygon, where the building receives mail or has telephone service.

Usually a residential address consists of a single building. For houses with outbuildings (detached garages, shed, barns, etc.), only the residences have a structure point. Condominiums and duplexes have multiple points for each building. Larger buildings, such as apartment complexes, typically receive mail at one address for each building and therefore individual apartments are not represented as discrete structure points.

Shopping malls, industrial complexes, and academic or medical center campuses where one building accepts mail for the entire complex are represented as one point. When addresses are assigned to multiple buildings within one complex, each addressed structure is represented by a point.

If the center of a structure falls outside of its polygon, the center is manually repositioned to fall inside the polygon.

07

Manually placed

Address points are manually placed to coincide with the midpoint of an assessor's parcel's street frontage at a distance from the center line.

08

Front door point

Represents the designated primary entrance to a building. If a building has multiple entrances and there is no designated primary entrance or the primary entrance cannot readily be

| Code | Description |
|--|---|
| | determined, the primary entrance is chosen based on proximity to the main access street and availability of parking. |
| 09 | Driveway offset point Represents a point located on the primary access road (most commonly a driveway) at a perpendicular distance of between 33- 98 feet (10-30 meters) from the main roadway. |
| 10 | Street access point Represents the primary point of access from the street network. This address point type is located where the driveway or other access road intersects the main roadway. |
| 21 | Base parcel point The Centrus point data includes individual parcels that may be "stacked". These stacked parcels are individually identified by their unit or suite number, and the Enterprise Tax Module is able to match to this unit number and return the correct APN. If an input address is for a building or complex, without a unit number, the "base" parcel information returns and will not standardize to a unit number or return additional information such as an APN. |
| 22 | Backfill address point The precise parcel centroid is unknown. The address location assigned is based on two known parcel centroids. |
| 23 | Virtual address point The precise parcel centroid is unknown. The address location assigned is relative to a known parcel centroid and a street segment end point. |
| 24 | Interpolated address point The precise parcel centroid is unknown. The address location assigned is based on street segment end points. |
| ARn - Ranged address geocode, where n = | |
| 1 | The geocode is placed along a single street segment, midway between the interpolated location of the first and second input house numbers in the range. |

| Code | Description |
|--|--|
| 2 | The geocode is placed along a single street segment, midway between the interpolated location of the first and second input house numbers in the range, and the side of the street is unknown. The Census FIPS Block ID is assigned from the left side; however, there is no assigned offset and the point is placed directly on the street. |
| 4 | The input range spans multiple USPS segments. The geocode is placed on the endpoint of the segment which corresponds to the first input house number, closest to the end nearest the second input house number. |
| 7 | Placeholder. Used when the starting and ending points of the matched segment contain the same value and shape data is not available. |
| AXn - Intersection geocode, where n = | |
| 3 | Standard single-point intersection computed from the center lines of street segments. |
| 8 | Interpolated (divided-road) intersection geocode. Attempts to return a centroid for the intersection. |

Street centroid location codes

Street centroid location codes indicate the Census ID accuracy and the position of the geocode on the returned street segment. A street centroid location code has the following characters.

| Character | Description |
|---------------|---|
| 1st character | Always 'C' indicating a location derived from a street segment. |
| 2nd character | Census ID accuracy based on the search area used to obtain matching street segment. |
| 3rd character | Location of geocode on the returned street segment. |

The following table contains the values and descriptions for the street centroid location codes.

| Character position | Code | Description |
|--------------------|------|--|
| 2nd Character | | |
| | B | Block Group accuracy (most accurate). Based on input ZIP Code. |
| | T | Census Tract accuracy. Based on input ZIP Code. |
| | C | Unclassified Census accuracy. Normally accurate to at least the County level. Based on input ZIP Code. |
| | F | Unknown Census accuracy. Based on Finance area. |
| | P | Unknown Census accuracy. Based on input City. |
| 3rd Character | | |
| | C | Segment centroid. |
| | L | Segment low-range endpoint. |
| | H | Segment high-range endpoint. |

ZIP + 4 Location Codes

ZIP + 4[®] centroid location codes indicate the quality of two location attributes: Census ID accuracy and positional accuracy. A ZIP + 4 centroid location code has the following characters.

| Character | Description |
|---------------|---|
| 1st character | Always a 'Z' indicating a location derived from a ZIP centroid.. |
| 2nd character | Census ID accuracy. |
| 3rd character | Location type. |
| 4th character | How the location and Census ID was defined. Provided for completeness, but may not be useful for most applications. |

The following table contains the values and descriptions for the ZIP + 4 location codes.

| Character position | Code | Description |
|--------------------|------|--|
| 2nd Character | | |
| | B | Block Group accuracy (most accurate). |
| | T | Census Tract accuracy. |
| | C | Unclassified Census accuracy. Normally accurate to at least the County level. Based on input ZIP Code. |
| 3rd Character | | |
| | 5 | Location of the Post Office that delivers mail to the address, a 5-digit ZIP Code centroid, or a location based upon locale (city). See the 4th character for a precise indication of locational accuracy. |
| | 7 | Location based upon a ZIP + 2 centroid. These locations can represent a multiple block area in urban locations, or a slightly larger area in rural settings. |
| | 9 | Location based upon a ZIP + 4 centroid. These are the most accurate centroids and normally place the location on the correct block face. For a small number of records, the location may be the middle of the entire street on which the ZIP + 4 falls. See the 4th character for a precise indication of locational accuracy. |
| 4th Character | | |
| | A | Address matched to a single segment. Location assigned in the middle of the matched street segment, offset to the proper side of the street. |
| | a | Address matched to a single segment, but the correct side of the street is unknown. Location assigned in the middle of the matched street segment, offset to the left side of the street, as address ranges increase. |
| | B | Address matched to multiple segments, all segments have the same Block Group. Location assigned to the middle of the |

| Character position | Code | Description |
|--------------------|------|--|
| | | matched street segment with the most house number ranges within this ZIP + 4. Location offset to the proper side of the street. |
| b | | Same as methodology B except the correct side of the street is unknown. Location assigned in the middle of the matched street segment, offset to the left side of the street, as address ranges increase. |
| C | | Address matched to multiple segments, with all segments having the same Census Tract. Returns the Block Group representing the most households in this ZIP + 4. Location assigned to the middle of the matched street segment with the most house number ranges within this ZIP + 4. Location offset to the proper side of the street. |
| c | | Same as methodology C except the correct side of the street is unknown. Location assigned in the middle of the matched street segment, offset to the left side of the street, as address ranges increase. |
| D | | Address matched to multiple segments, with all segments having the same County. Returns the Block Group representing the most households in this ZIP + 4. Location assigned to the middle of the matched street segment with the most house number ranges within this ZIP + 4. Location offset to the proper side of the street. |
| d | | Same as methodology D except the correct side of the street is unknown. Location assigned in the middle of the matched street segment, offset to the left side of the street, as address ranges increase. |
| E | | Street name matched; no house ranges available. All matched segments have the same Block Group. Location placed on the segment closest to the center of the matched segments. In most cases, this is on the mid-point of the entire street. |
| F | | Street name matched; no house ranges available. All matched segments have the same Census Tract. Location placed on the segment closest to the center of the matched segments. In most cases, this is on the mid-point of the entire street. |
| G | | Street name matched (no house ranges available). All matched segments have the same County. Location placed on the |

| Character position | Code | Description |
|--------------------|------|---|
| | | segment closest to the center of the matched segments. In most cases, this is on the mid-point of the entire street. |
| | H | Same as methodology G, but some segments are not in the same County. Used for less than .05% of the centroids. |
| | I | Created ZIP + 2 cluster centroid as defined by methodologies A, a, B, and b. All centroids in this ZIP + 2 cluster have the same Block Group. Location assigned to the ZIP + 2 centroid. |
| | J | Created ZIP + 2 cluster centroid as defined by methodologies A, a, B, b, C, and c. All centroids in this ZIP + 2 cluster have the same Census Tract. Location assigned to the ZIP + 2 centroid. |
| | K | Created ZIP + 2 cluster centroid as defined by methodologies A, a, B, b, C, c, D, and d. Location assigned to the ZIP + 2 centroid. |
| | L | Created ZIP + 2 cluster centroid as defined by methodology E. All centroids in this ZIP + 2 cluster have the same Block Group. Location assigned to the ZIP + 2 centroid. |
| | M | Created ZIP+2 cluster centroid as defined by methodology E and F. All centroids in this ZIP + 2 cluster have the same Census Tract. Location assigned to the ZIP + 2 centroid. |
| | N | Created ZIP + 2 cluster centroid as defined by methodology E, F, G, and H. Location assigned to the ZIP + 2 centroid. |
| | O | ZIP Code is obsolete and not currently used by the USPS. Historic location assigned. |
| | V | Over 95% of addresses in this ZIP Code are in a single Census Tract. Location assigned to the ZIP Code centroid. |
| | W | Over 80% of addresses in this ZIP Code are in a single Census Tract. Reasonable Census Tract accuracy. Location assigned to the ZIP Code centroid. |
| | X | Less than 80% of addresses in this ZIP Code are in a single Census Tract. Census ID is uncertain. Location assigned to the ZIP Code centroid. |

| Character position | Code | Description |
|--------------------|------|--|
| | Y | Rural or sparsely populated area. Census code is uncertain. Location based upon the USGS places file. |
| | Z | P.O. Box or General Delivery addresses. Census code is uncertain. Location based upon the Post Office location that delivers the mail to that address. |

Geographic Centroid Location Codes

Geographic centroid location codes indicate the quality of two location attributes: the geographic location and area type.

| Character | Description |
|---------------|--|
| 1st character | Always 'G' indicating a location derived from a geographic centroid. |
| 2nd character | Geographic area type. |

The following table contains the values and descriptions for the geographic centroid location codes.

| Character position | Code | Description |
|--------------------|------|----------------------|
| 2nd Character | | |
| | M | Municipality (city). |
| | C | County. |
| | S | State. |

B - Payroll Tax Correspondence File

In this section

| | |
|---|-----|
| Using a Payroll Tax Correspondence File | 120 |
|---|-----|

Using a Payroll Tax Correspondence File

Payroll system tax codes are proprietary codes used by some payroll tax applications to represent specific jurisdictions or combinations of jurisdictions. If you have licensed this option, you can use a payroll tax correspondence (PTC) file to determine the payroll system tax codes for a given address.

To use a payroll system tax code database, customize the PTC file and then install the file.

1. Customize the PTC file.

After you receive your initial PTC file, modify it using a text editor of your choice. Specifically, you need to modify the following:

- **Description**—A meaningful description of the code that represents business rules within your organization.
- **Flags**—Flags indicate the payroll codes you want Assign GeoTAX Info to return. Possible flag values are:
 - **N**—No, do not return this payroll tax code. Continue searching the PTC file for other matching records. A blank flag has the same effect as "N".
 - **D**—Done. Return this payroll system tax code and stop searching the PTC file for other matching records.
 - **Any other value**—Any other value indicates to return the code. Typically, the letter Y (for "yes") is used. Use other flags if you like. For example, if there is an area with two codes, one for a work location and the other for the worker's residence, you could use flags of "W" and "R" so that the output field PTCn.PayrollFlag returned by Assign GeoTAXInfo indicates the type of location.

The following table shows how to use flags.

Note: Each record in the PTC file can contain up to six payroll system tax codes and their associated descriptions and flags. In the following example, the first three codes are on the first record and the second three are on the second. See [Table 44: Payroll System Tax Code File Layout](#) on page 122 for the layout of the PTC file.

Table 43: Example PTC File

| Record | Description | Payroll System Tax Code | Flag |
|--------|-----------------|-------------------------|------|
| 1 | HARBORCREEK TWP | 123ABC | D |
| | HARBOR CREEK SD | 456DEF | D |

| Record | Description | Payroll System Tax Code | Flag |
|--------|--------------------------|-------------------------|------|
| | HARBORCREEK TWP (M + SD) | 789GHI | N |
| 2 | DAYTON BORO | 592UID | Y |
| | ARMSTRONG SD | 143XMA | Y |
| | DAYTON BORO (M + SD) | 592JKT | N |

In this example, the first record in the PTC file contains tax codes for a municipality called Harbor Creek Township and a school district called Harbor Creek School District. There is a separate code that represents points that are in both the Harbor Creek Township and the Harbor Creek School District. The second record in the PTC file contains codes for Dayton, a school district called Armstrong, and points located in both Dayton and the Armstrong School District.

This example returns the payroll system tax codes for the individual taxing jurisdictions for a given address, not the codes that represent the combined jurisdictions.

For addresses located in both the Harbor Creek Township and Harbor Creek School District, Assign GeoTAX Info returns the following:

- PTC1.PayrollDescription=HARBORCREEK TWP
- PTC1.PayrollCode=123ABC
- PTC1.PayrollFlag=D
- PTC2.PayrollDescription=HARBOR CREEK SD
- PTC2.PayrollCode=456DEF
- PTC2.PayrollFlag=D

For addresses located in both Dayton and the Armstrong School District, Assign GeoTAX Info returns the following:

- PTC1.PayrollDescription=DAYTON BORO
- PTC1.PayrollCode=592UID
- PTC1.PayrollFlag=Y
- PTC2.PayrollDescription=ARMSTRONG SD
- PTC2.PayrollCode=143XMA
- PTC2.PayrollFlag=Y
- For addresses located in just Dayton but not the Armstrong School District, Assign GeoTAX Info returns the code 592UID and its associated flag and description. For addresses located

in just the Armstrong School District but not Dayton, Assign GeoTAX Info returns the code 143XMA and its associated flag and description.

Note: For a listing of output fields returned for payroll system tax codes, see [Payroll System Tax Code](#) on page 38.

The following table describes the PTC file layout.

Table 44: Payroll System Tax Code File Layout

| Position | Length | Name |
|--|--------|--|
| 1 | 9 | (required) Key Value. Lookup key into the file. Must be one of the following. <ul style="list-style-type: none"> • 5 character jurisdiction ID from the Pay.txb boundary file. This file contains polygons for special areas, such as school districts. • 9 character GNIS code. • 5 character county key made up of the State and County FIPS codes. • 2 character State FIPS code. |
| 10 | 2 | (optional) State |
| 12 | 30 | (optional) County |
| The payroll code and payroll description fields are paired. Each pair has a corresponding flag field. The flag field determines if GeoTAX returns data for the corresponding payroll code and description fields. GeoTAX does not return the fields if the flag is N or blank. This lets you create meaningful flags based on your business rules. | | |
| 42 | 15 | Payroll code 1 |
| 57 | 40 | Payroll description 1 |
| 97 | 15 | Payroll code 2 |
| 112 | 40 | Payroll description 2 |
| 152 | 15 | Payroll code 3 |

| Position | Length | Name |
|----------|--------|------|
|----------|--------|------|

| | | |
|-----|----|-----------------------|
| 167 | 40 | Payroll description 3 |
|-----|----|-----------------------|

| | | |
|-----|----|----------------|
| 207 | 15 | Payroll code 4 |
|-----|----|----------------|

| | | |
|-----|----|-----------------------|
| 222 | 40 | Payroll description 4 |
|-----|----|-----------------------|

| | | |
|-----|----|----------------|
| 262 | 15 | Payroll code 5 |
|-----|----|----------------|

| | | |
|-----|----|-----------------------|
| 277 | 40 | Payroll description 5 |
|-----|----|-----------------------|

| | | |
|-----|----|----------------|
| 317 | 15 | Payroll code 6 |
|-----|----|----------------|

| | | |
|-----|----|-----------------------|
| 332 | 40 | Payroll description 6 |
|-----|----|-----------------------|

| | | |
|-----|---|--------|
| 372 | 1 | Flag 1 |
|-----|---|--------|

| | | |
|-----|---|--------|
| 373 | 1 | Flag 2 |
|-----|---|--------|

| | | |
|-----|---|--------|
| 374 | 1 | Flag 3 |
|-----|---|--------|

| | | |
|-----|---|--------|
| 375 | 1 | Flag 4 |
|-----|---|--------|

| | | |
|-----|---|--------|
| 376 | 1 | Flag 5 |
|-----|---|--------|

| | | |
|-----|---|--------|
| 377 | 1 | Flag 6 |
|-----|---|--------|

2. Install the PTC file. For instructions on installing the PTC file, see the *Spectrum™ Technology Platform Installation Guide*

PTC file updates are provided at intervals defined in your contract. When you receive the PTC update files, enter flags for the modified records and then run Enterprise Tax Module database load utility to merge the updated PTC file with your existing file. For instructions, see "Installing Payroll Tax Correspondence Files" in the *Spectrum™ Technology Platform Installation Guide*. This process maintains the existing user-defined flags you have already associated with the PTC data.

C - User-Defined Data Files

In this section

| | |
|--|-----|
| Creating a Landmark Auxiliary File | 126 |
| Creating a User-Defined Auxiliary File | 132 |
| Creating a User-Defined Boundary File | 135 |

Creating a Landmark Auxiliary File

The Landmark Auxiliary File provides you a way to specify customized address information in your input records. The recommended primary use of this file is to match to your company's non-address locations such as well heads, transmission towers or any other descriptive location. The latitude/longitude that is part of the input needed to build this file allows companies to automatically keep track of any jurisdictional changes that affect these unique locations. Matching to this file requires that the input record information match exactly to the Landmark file contents. This also applies to street records if you choose to enter them in the Landmark file.

Landmark Auxiliary file requirements

The Landmark Auxiliary file requirements include:

- The file must be a fixed-width text file: On Windows and UNIX, the text file must be ASCII
- The file must have a .gax extension on Windows and UNIX
- The file must have less than 500,000 records
- The file must follow the column field order and lengths specified in [Landmark File Layout](#).

Record types

You can include two types of records in your Landmark Auxiliary file: Landmark and Street Records.

A **Landmark record** represent a single site. To be a valid landmark record, the record must have the following fields:

- ZIP Code
- Name of the landmark - placed in the street name field
- Beginning latitude of the landmark
- Beginning longitude of the landmark

In addition, a Landmark record may NOT have the following fields:

- Street type abbreviation
- Pre-directional abbreviation
- Post-directional abbreviation
- Low house number
- High house number

A **Street record** contains a range of one or more addresses on a street. To be a valid street record the record must have the following fields:

- ZIP Code
- Street name
- Street type abbreviation, if part of the address
- Pre-directional abbreviation, if part of the address

- Post-directional abbreviation, if part of the address
- Low house number within the street segment
- High house number within the street segment
- Beginning longitude of the street segment
- Beginning latitude of the street segment

In addition, a Street record may NOT have the following fields:

- Secondary address information, such as unit numbers
- Mailstops
- Private mail boxes (PMBs)

During processing ignores any record that does not comply with the preceding requirements.

Landmark Auxiliary file organization

You must comply with the following organizational rules when creating your Landmark Auxiliary file.

- Use semicolons in the first column to indicate a row is a comment, not a data record; Enterprise Tax Module ignores rows that begin with a semicolon.
- Order the records within the file by descending ZIP Code then descending street name for optimal performance.
- All records must represent one or both sides of a street.
- All records must represent segments that are straight lines. Records cannot represent a non-straight segment.
- If house numbers are present in the record, the house number range must be valid according to USPS rules documented in Publication 28.
- The numeric fields, such as ZIP Codes, must contain all numbers.
- Latitude and longitude values must be in millionths of decimal degrees.
- Records cannot contain PO Box addresses.

Default values

Enterprise Tax Module uses the following defaults if you do not include the values in the Landmark Auxiliary file:

- House number parity = B (both odds and evens)
- Segment direction = F (forward) or A (ascending), these are interchangeable.
- Side of street = U (unknown)

*Landmark Auxiliary file layout***Table 45: Landmark Auxiliary File Layout**

| Field | Description | Required For Street Segment | Required For Landmark | Requires Exact Match | Length | Position |
|----------------------------------|---|--------------------------------------|-----------------------------|----------------------------|--------|----------|
| ZIP Code | 5-digit ZIP Code | X | X | X | 5 | 1-5 |
| Street name | Name of the street or landmark | X | X | X | 30 | 6-35 |
| Street type abbreviation | Street type. Also called street suffix. See the USPS Publication 28 for a complete list of supported street types. | | | X | 4 | 36-39 |
| Predirectional | USPS street name predirectional abbreviation. Supported values are N, E, S, W, NE, NW, SE, and SW. | | | X | 2 | 40-41 |
| Postdirectional | USPS street name postdirectional abbreviations. Supported values are N, E, S, W, NE, NW, SE, and SW. | | | | | |
| Reserved | Reserved | | | | 4 | 44-47 |
| Low house number | Low house number of the address range. | X | | | 11 | 48-58 |
| High house number | High house number of the address range. | X | | | 11 | 59-69 |
| House number parity ¹ | Parity of the house number in the range: <ul style="list-style-type: none">• E - Even• O - Odd• B - Both | | | | 1 | 70 |

¹ For even and odd house number parity records, this specifies on which side of the street the house lays. For records containing both even and odd house numbers, the odd house numbers are on the specified side of the street, and the even house numbers are on the other side. This is a factor when using street offset.

| Field | Description | Required For Street Segment | Required For Landmark | Requires Exact Match | Length | Position |
|--------------------|--|--------------------------------------|-----------------------------|----------------------------|--------|----------|
| Segment direction | Direction the house numbers progress along the segment from the viewpoint of the segment's starting coordinate: <ul style="list-style-type: none">• F - Forward (default) or A - Ascending• R - Reverse or D - Descending | | | | 1 | 71 |
| Reserved | Reserved | | | | 1 | 72 |
| FIPS state | US government FIPS state code. | | | | 2 | 73-74 |
| FIPS county | US government FIPS county code. | | | | 3 | 75-77 |
| Census tract | US Census tract number. | | | | 6 | 78-83 |
| Census block group | US Census block group number. | | | | 1 | 84 |
| Census block ID | US Census block ID number. | | | | 3 | 85-87 |
| Reserved | Reserved | | | | 5 | 88-92 |
| State abbreviation | USPS state abbreviation | | | | 2 | 93-95 |
| County name | Name of the county. | | | | 25 | 95-119 |
| MCD code | Minor Civil Division code. | | | | 5 | 120-124 |
| MCD name | Minor Civil Division name. | | | | 40 | 125-164 |
| CBSA code | Core Based Statistical Area code. | | | | 5 | 165-169 |
| CBSA name | Core Based Statistical Area name. | | | | 49 | 170-218 |
| Reserved | Reserved | | | | 5 | 219-223 |

| Field | Description | Required For Street | Required For Landmark | Requires Exact Match | Length | Position |
|---------------------|--|---------------------|-----------------------|----------------------|--------|----------|
| City Name | City name. Overrides the city/state preferred city name upon a return. | | | | 40 | 224-263 |
| Reserved | Reserved | | | | 237 | 264-500 |
| User-defined data | User-defined data. | | | | 300 | 501-800 |
| Record ID Number | User-defined unique record identifier. | | | | 10 | 801-810 |
| Side of street | <p>Side of the street for the address:</p> <ul style="list-style-type: none"> • L - Left side • R - Right side • B - Both sides • U - Unknown side (default) <p>This is from the viewpoint of the segment's starting coordinate.</p> | | | | 1 | 811 |
| Beginning longitude | Beginning longitude of the street segment in millionths of degrees. | X | X | | 11 | 812-822 |
| Beginning latitude | Beginning latitude of the street segment in millionths of degrees. | X | X | | 10 | 823-832 |
| Ending longitude | Ending longitude of the street segment in millionths of degrees. | | | | 11 | 833-843 |
| Ending latitude | Ending latitude of the street segment in millionths of degrees. | | | | 10 | 844-853 |

Matching to the Landmark Auxiliary file

Enterprise Tax Module performs the following steps when matching an input address to a Landmark Auxiliary file.

1. Enterprise Tax Module determines if there is a Landmark Auxiliary file present. If more than one Landmark Auxiliary file is present, Enterprise Tax Module attempts to match against the first file.

Enterprise Tax Module ignores any additional Landmark Auxiliary files for matching, regardless if Enterprise Tax Module found a match to the first auxiliary file.

If a record within the Landmark Auxiliary files is invalid, Enterprise Tax Module returns a message indicating the auxiliary file has an invalid record. Enterprise Tax Module continues to process input addresses against the Landmark Auxiliary file, but will not match to the invalid auxiliary file record.

2. If the Landmark Auxiliary file is present, Enterprise Tax Module first attempts to match to it. If more than one type of auxiliary file is present, the search order is:

- Landmark Auxiliary file
- User Auxiliary file
- State-supplied file
- GeoTAX Auxiliary file

Note: Enterprise Tax Module only matches your input address to your Landmark Auxiliary file if there is an exact match. Therefore, your input address list should be as clean as possible; free of misspellings and incomplete addresses.

3. If Enterprise Tax Module finds an exact record match to the Landmark Auxiliary file, it standardizes the match to USPS regulations and returns the output of the auxiliary file match.

Note: You cannot update the Landmark Auxiliary file while Enterprise Tax Module is running. If you want to update the auxiliary file, you need to terminate Enterprise Tax Module before attempting to replace or edit the file.

Record type matching rules

When attempting a match against the Landmark Auxiliary file, GeoTAX abides by the following rules:

Landmark record match

- The input data must contain both a ZIP Code and address line, and they must exactly match the values on the auxiliary record.
- The input address cannot have any other data, such as a house number, unit number, or Private Mail Box (PMB).

Note: Enterprise Tax Module only matches the ZIP Code against the auxiliary file. GeoTAX does not verify that the ZIP Code of the input address record is correct for the city and state. You should validate this information in your input address before processing against the auxiliary file.

Street record match

- The input house number must fall within or be equal to the low and high house number values of the auxiliary record.
- The input house number must agree with the parity of the auxiliary record.
- The input ZIP Code must exactly match the ZIP Code of the auxiliary record.

Creating a User-Defined Auxiliary File

To enter data in a user-defined auxiliary file, you can use your own editor or data entry program. If you are running on Windows, you can use the Auxiliary File Editor available on the *GeoTAX Utilities CD*. The *GeoTAX Utilities CD* can be downloaded from the www.g1.com/Support web site. Select the **GeoTAX** product page; the utilities download and document links are provided on the **Subcomponents** panel.

Sort the records by ascending ZIP Code, street name, street type, directional, low house range, and descending high house range to minimize the time required to street-level match.

The auxiliary file has a block size of 8K, key length of 47 bytes, and record length of 800 bytes. The sample file `SEQAUX` illustrates the layout of the file.

The following table describes the layout of the auxiliary file. After you create a file with this layout, install the file using the Enterprise Tax Module database load utility. For instructions, see the *Spectrum™ Technology Platform Installation Guide*.

Table 46: User-Defined Auxiliary File Layout

| Position | Field Name | Description | Length |
|----------|---------------------------------|---------------------------------|--------|
| <hr/> | | | |
| | Input Key Area (Must be Unique) | | |
| 1-5 | G1GTAUX-ZIP-CODE | ZIP Code | 5 |
| 6-35 | G1GTAUX-STREETNAME | Street name | 30 |
| 36-39 | G1GTAUX-STREET-TYPE | Street type | 4 |
| 40-41 | G1GTAUX-PRE-DIR | Predirectional | 2 |
| 42-43 | G1GTAUX-POST-DIR | Postdirectional | 2 |
| 44-47 | G1GTAUX-SEQ | Sequence number, from 0001-9999 | 4 |

| Position | Field Name | Description | Length |
|----------|--------------------------|---|--------|
| <hr/> | | | |
| | Output Area | | |
| 48-58 | G1GTAUX-OUTPUTRANGE-FROM | First number in the house number range (right adjusted, blankfilled) | 11 |
| 59-69 | G1GTAUX-OUTPUTRANGE-TO | Last number in the house number range (right adjusted, blankfilled) | 11 |
| 70 | G1GTAUX-OUTPUTODD-EVEN | <ul style="list-style-type: none"> • O = Odd • E = Even | 1 |
| 71 | G1GTAUX-OUTPUTASC-DESC | <ul style="list-style-type: none"> • A = Ascending • D = Descending | 1 |
| 72 | Reserved | | |
| 73-74 | G1GTAUX-STATE-CODE | FIPS State Code | 2,0 |
| 75-77 | G1GTAUX-COUNTYCODE | FIPS County Code | 3,0 |
| 78-83 | G1GTAUX-CENSUSTRACT | 6-digit Census Tract number | 6,0 |
| 84 | G1GTAUX-BLOCKGROUP | 1-digit Block Group | 1 |
| 85-92 | Reserved | | 8 |
| 93-94 | G1GTAUX-STATE-ABBV | USPS state abbreviation | 2 |

| Position | Field Name | Description | Length |
|----------|----------------------------|--|--------|
| 95-119 | G1GTAUX-COUNTYNAME | County name | 25 |
| 120-124 | G1GTAUX-MCD-CODE | 5-digit MCD Code | 5,0 |
| 125-164 | G1GTAUX-MCD-NAME | MCD Name | 40 |
| 165-168 | G1GTAUX-MSA-CODE | 4-digit MSA Code | 4,0 |
| 169-218 | G1GTAUX-MSA-NAME | MSA Name | 50 |
| 219-223 | G1GTAUX-PLACE-CODE | 5-digit Place Code | 5,0 |
| 224-263 | G1GTAUX-PLACENAME | Place Name | 40 |
| 264-265 | G1GTAUX-PLACECLASS-CODE | 2-digit Place Class Code | 2 |
| 266 | G1GTAUX-PLACE-INCFLAG | <ul style="list-style-type: none"> • U - Unincorporated • I - Incorporated | 1 |
| 267-273 | G1GTAUX-PLACE-LASTANNEXED | Place last annexed date, in the format MM/YYYY | 7 |
| 274-280 | G1GTAUX-PLACE-LASTUPDATED | Place last updated date, in the format MM/YYYY | 7 |
| 281-287 | G1GTAUX-PLACE-LASTVERIFIED | Place last verified date, in the format MM/YYYY | 7 |
| 288-296 | G1GTAUX-PLACE-GNIS | GNIS Code | 9 |

| Position | Field Name | Description | Length |
|----------|------------------|-------------------|--------|
| 297-500 | Reserved | | 204 |
| 501-800 | G1GTAUX-AUX-AREA | User-defined data | 300 |

Creating a User-Defined Boundary File

User-defined boundary files define areas of interest to your organization, such as sales territories or insurance rating territories. Assign GeoTAX Info uses this data to determine if an address falls within an area of interest. For example, you can create a boundary file that defines your sales territories. Assign GeoTAX Info can then determine the tax jurisdictions that apply to an address and the sales territory of that address.

Note: User-defined boundary files in Assign GeoTAX Info allow you to perform basic "point-in-polygon" spatial analysis. Point In Polygon provides additional point-in-polygon features.

1. Create an ESRI shapefile (.SHP) or MapInfo data interchange format file (.MIF) with the boundaries you want. Your .SHP or .MIF file can have up to three columns of user-defined data. The first and second columns are 10 bytes long and the third column is 50 bytes long. For information on .SHP and .MIF files, see [User-Defined Centrus Databases](#).
2. Use the Boundary File Conversion utility to convert your .SHP or .MIF file to a .TXB file. The Boundary File Conversion utility is available on the *GeoTAX Utilities CD*. The *GeoTAX Utilities CD* can be downloaded from the www.g1.com/Support web site. Select the **GeoTAX** product page; the utilities download and document links are provided on the **Subcomponents** panel.
3. Load the User-Defined Boundary file using the appropriate database load procedure based on your platform. The filename that should be entered for the User-Defined Boundary file is *usr.txb*.

D - Type Codes

In this section

Type Codes

137

Type Codes

The returned type code is referenced from an installed tax district file and indicates the type of tax district or tax jurisdiction for the address location.

This appendix provides the definitions for the following tax district files' type codes:

- **Special Purpose Districts (SPD)**
- **Insurance Premium Districts (IPD)**
- **Payroll Tax Districts (PAY)**
- **Property Tax Districts (PTD)**

Special Purpose District (SPD)

| Type | Descriptions |
|------|-----------------------------------|
| AMB | AMBULANCE DISTRICT |
| ASC | SALES AND USE TAX |
| ATA | ADVANCED TRANSPORTATION AUTHORITY |
| ATD | AIRPORT TAX DISTRICT |
| BSD | BASEBALL STADIUM DISTRICT |
| CAD | COUNTY ASSISTANCE DISTRICT |
| CCD | CRIME CONTROL DISTRICT |
| CFA | COUNTY FINANCE AUTHORITY |
| CMB | COMBINED DISTRICT |
| CTY | CITY TRANSACTIONS |
| DVD | DEVELOPMENT DISTRICT |
| EDZ | ECONOMIC DEVELOPMENT ZONE |
| ESD | EMERGENCY SERVICES DISTRICT |

| Type | Descriptions |
|------|--------------------------------|
| FCD | FIRE CONTROL DISTRICT |
| FPA | FLOOD PROTECTION AUTHORITY |
| FPD | FIRE PROTECTION DISTRICT |
| FSD | FOOTBALL STADIUM DISTRICT |
| HBZ | HOSPITAL BENEFIT ZONE |
| HSA | HOUSING AUTHORITY |
| HSD | HEALTHCARE SERVICES DISTRICT |
| HSP | HOSPITAL DISTRICT |
| IMP | IMPROVEMENT DISTRICT |
| IRD | INDIAN RESERVATION |
| LFW | LFW/CDC |
| LIB | LIBRARY DISTRICT |
| MSD | MUSEUM DISTRICT |
| MTA | METRO TRANSPORTATION AUTHORITY |
| OSA | OPEN SPACE AUTHORITY |
| PFD | PUBLIC FACILITY DISTRICT |
| POL | POLICE DISTRICT |
| PRD | PARK AND RECREATION DISTRICT |
| PSI | PUBLIC SAFETY IMPROVEMENT |
| RCT | RACE TRACK |

| Type | Descriptions |
|------|--|
| RDA | REVENUE DEVELOPMENT AREA |
| RMA | ROAD MAINTENANCE AUTHORITY |
| RTA | REGIONAL TRANSPORTATION AUTHORITY |
| SAD | SPORTS DISTRICT |
| SCD | SCIENCE AND CULTURAL DISTRICT |
| SUT | SALES AND USE TAX |
| TDD | TRANSPORTATION DEVELOPMENT DISTRICT |
| TED | TOURISM COMMUNITY ENHANCEMENT DISTRICT |
| UNI | SCHOOL DISTRICT |
| URA | URBAN RENEWAL AUTHORITY |
| WCD | WATER COMMISSION DISTRICT |
| ZOO | ZOO DISTRICT |

Insurance Premium Districts (IPD)

| State | Type | Descriptions |
|-------|--------|-------------------------|
| AL | FIRE | Fire District |
| AL | NT-MUN | Non-Taxing Municipality |
| AL | PREM | Premium Tax District |
| AZ | PRIV | Private Fire District |
| AZ | PUB | Public Fire District |

| State | Type | Descriptions |
|-------|--------|--------------------------------------|
| DE | FIRE | Fire District |
| FL | FIRE | Fire District |
| FL | POLICE | Police District |
| GA | PREM | Premium Tax District |
| IL | FIRE | Fire District |
| KY | COUNTY | County |
| KY | MUNI | Municipality |
| KY | USD | Urban Services District |
| LA | PREM | Premium Tax District |
| MN | FIRE | Fire District |
| ND | FIRE | Fire District |
| NJ | FIRE | Fire District |
| NY | FIRE | Fire District |
| SC | FIRE | Fire District |
| SC | NT-MUN | Non-Taxing Municipality |
| SC | PREM | Premium Tax District |
| TX | PROP | Windstorm Surcharge on Property Line |

Payroll Tax Districts (PAY)

| Type | Descriptions |
|------|-------------------------------------|
| JED | Joint Economic Development District |
| MTA | Mass Transit Authority |
| MUN | Municipality |
| UNI | School District |

Property Tax Districts (PTD)

| Type | Descriptions |
|------|-----------------------|
| B | Billing |
| R | Reporting |
| X | Reporting and Billing |

E - Class Codes

In this section

| | |
|-------------|-----|
| Class Codes | 143 |
|-------------|-----|

Class Codes

This appendix lists definitions for the FIPS Class Codes.

Class C — Incorporated Places

| Class Code | Description |
|------------|--|
| C1 | <p>Identifies an active incorporated place that is not also recognized as an Alaska Native Village Statistical area, and does not also serve as a primary county division; that is, it is included in and is part of a primary county division.</p> <p>For example, the city of Hammond, Indiana is within and part of North township; the city of Austin, Texas is within and part of several census county divisions in several counties; Hammond and Austin are coded C1.</p> |
| C2 | <p>Identifies an incorporated place that also serves as a primary county division because, although the place is coextensive with a minor civil division (MCD), the Census Bureau, in agreement with State officials, does not recognize the MCD for presenting census data because the MCD is a nonfunctioning entity; applies to Iowa and Ohio only.</p> <p>For example, the city of Dubuque, Iowa is coextensive with Julien township, which does not function as a governmental unit and may not be well-known even to local residents; the city is assigned code C2, and the township, Z8. This subclass is new for FIPS 55-3. Also see subclass C5.</p> |
| C3 | <p>Identifies a consolidated city; that is, an incorporated place that has consolidated its governmental functions with a county or MCD, but continues to include other incorporated places that are legally part of the consolidated government.</p> <p>For example, the city of Columbus, Georgia is consolidated with Muscogee County, which continues to exist as a nonfunctioning legal entity in the State; however, the town of Bibb City continues to exist as a separate active incorporated place within the consolidated government and, therefore, Columbus is treated as a consolidated city. At the time of publication, there are seven consolidated cities in the United States: Athens-Clarke County, Georgia; Butte-Silver Bow, Montana; Columbus, Georgia; Indianapolis, Indiana; Jacksonville, Florida; Milford, Connecticut; and Nashville-Davidson, Tennessee. This subclass is new for FIPS 55-3.</p> |

| Class Code | Description |
|------------|---|
| C4 | <p>Identifies an alternate authoritative common name of any member of the other subclasses of Class C. The entity code of the legal name is referenced in the ``Other Name Code'' of the record, and in the entry for the legal name, the Other Name Code references the alternate.</p> <p>For example, the entity in California whose legal name is San Buenaventura (subclass C1) is commonly known as Ventura, which is coded C4.</p> |
| C5 | <p>Identifies an incorporated place that also serves as a primary county division; that is, it is not included in any adjacent primary county division of class T or Z. For example, Boston, MA, is legally a primary division of the county and recognized as an incorporated place and, therefore, is coded C5. Also see subclass C2.</p> |
| C6 | <p>Identifies an incorporated place that is coincident with or approximates an Alaska Native Village statistical area. The Other Name Code references the Alaska Native Village statistical area; see code E6.</p> |
| C7 | <p>Identifies an independent city. At the time of publication, independent cities exist in only four States: Maryland (Baltimore City), Nevada (Carson City), Missouri (St. Louis City), and Virginia (41 cities). These cities also serve as county equivalents, and all but Carson City also serve as primary county divisions.</p> |
| C8 | <p>Identifies the portion of a consolidated city that is not within another incorporated place; see subclass C3. The Census Bureau identifies these nonfunctioning entities by taking the name of the consolidated city and appending in parentheses the word remainder. For example, Columbus (remainder) identifies the portion of the Columbus, Georgia consolidated city that is not also in Bibb City. This code is new for FIPS 55-3.</p> |
| C9 | <p>Identifies an inactive or nonfunctioning incorporated place.</p> |

Class U — Unincorporated Places (Except Those Associated with Facilities)

| Type | Descriptions |
|------|---|
| U1 | Identifies a census designated place (CDP) with a name identical to the authoritative common name that describes essentially the same population. Also see code M2. |
| U2 | Identifies a CDP with a name not identical to an authoritative common name of essentially the same area. If there is an alternate authoritative common name, it is referenced in the Other Name Code field. For example, Suitland-Silver Hill, Maryland is the name of a locally delineated CDP recognized by the Census Bureau which is a combination of two communities Suitland and Silver Hill and, therefore, because it is not the authoritative name of the area, is coded U2; Sierra Vista Southeast, Arizona is a CDP that includes the built-up area adjoining the city of Sierra Vista on the southeast, but is not an authoritative name for that area and, therefore, is coded U2. Also see code M2. |
| U3 | Identifies (a) an alternate, authoritative common name of a population essentially described by a specific CDP with a different name (the Other Name Code references the CDP), or (b) a community wholly or substantially within the boundaries of a CDP with a different name (the Part of Code references the CDP). For example, Silver Hill and Suitland are coded U3 and cross-referenced to the CDP of Suitland-Silver Hill (see code U2). |
| U4 | Identifies a populated place wholly or substantially within the boundaries of an incorporated place with a different name; the Part of Code identifies the incorporated place. For example, Harlem and Greenwich Village, which are part of New York city, and Hollywood, which is part of Los Angeles, California, are coded U4. |
| U5 | Dropped. Only one place the CDP of Arlington, Virginia was in this subclass in FIPS PUB 95-2; it has been recoded as U1 as a place and as Z3 as a subclass in FIPS 55-3 as a county subdivision. |
| U6 | Identifies a populated place located wholly or substantially outside the boundaries of any incorporated place or CDP with an authoritative common name recognized by the U.S. Geological Survey. |

| Type | Descriptions |
|------|---|
| U8 | Identifies a populated place located wholly or substantially outside the boundaries of an incorporated place or CDP but whose name has not been verified as authoritative by the U.S. Geological Survey. |
| U9 | Identifies a CDP that is coincident with or approximates the area of an Alaska Native Village statistical area. The Other Name Code references the Alaska Native Village statistical area; see code E2. This code is new for FIPS 55-3. |

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